

# **Help Desk Authority®**

## User Manual for Web

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### Help Desk Authority 9.0

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## Introduction

Help Desk Authority for Web keeps your support center running smoothly and efficiently by automating all aspects of Issue management. Help Desk Authority for Web offers maximum flexibility, accessibility, and scalability required for fast-paced support operations.

## How To Use This Manual

This manual is intended as both a guide to using Help Desk Authority for Web, and a reference to any Issues or questions you might have regarding the application. Detailed step-by-step instructions for all tasks will be provided, along with screen shots for each step.

There are also several important notifications throughout this manual:



Notes will contain additional information related to the immediate content where the note is found. Notes are a reminder of important things to consider when performing a task or procedure in Help Desk Authority for Web.



Alerts contain important information pertinent to the material discussed in the text. They often accompany detailed instructions vital to a task or procedure in Help Desk Authority for Web.

We recommend that you keep a copy of this manual close by for quick reference. Help Desk Authority for Web is a very intuitive application, and this manual will assist you in discovering the powerful, more detailed features that it has to offer.

## Installation of Help Desk Authority for Web

The Installation of Help Desk Authority for Web is automatic upon the installation of Help Desk Authority for Windows. No additional steps need to be taken.

## System Requirements

The system requirements are outlined in the Installation manuals, however, we feel it is important to add browser requirements to this document since it is a web-based version of Help Desk authority.

### Browser Requirements

#### HDAccess:

- Microsoft Internet Explorer 7/8/9
- Mozilla Firefox 3.6/4
- Google Chrome 11
- Apple Safari 5

#### HDWeb:

- Microsoft Internet Explorer 8
- Microsoft Internet Explorer 9 (Compatibility View mode only)
- Mozilla Firefox 3.6/4

## Chapter 1 – Navigating Help Desk Authority for Web

Logging on to Help Desk Authority for Web requires nothing more than your Logon Name and your Password. Enter both as shown below and click the Logon button. To reset the fields and start over, use the Reset button.



The screenshot shows the login interface for Help Desk Authority for Web. At the top, there is a green 'H' logo and the text 'Help Desk Management'. Below this is a blue banner with a shield icon containing a person at a laptop, and the text 'HELP DESK AUTHORITY 9 WEB'. The login fields are labeled 'Logon Name' and 'Password'. The 'Logon Name' field contains the text 'admin'. The 'Password' field contains ten dots. Below the fields are two buttons: 'Logon' and 'Reset'. At the bottom, there is a copyright notice: 'Copyright © 1996-2011 ScriptLogic Corporation. All rights reserved.' and the 'SCRIPTLOGIC' logo with the tagline 'A QUEST SOFTWARE COMPANY'.

When you initially log into Help Desk Authority for Web, the main window is displayed. There are six regions of the window as shown below. They are:

- The Main menu
- The Toolbar
- The Search window
- The Issue / Asset list



**HELP DESK AUTHORITY**

Toolbar: Issues, Assets, Reports, Dashboard, KBase, Query, Admin

Search Window: Search

Main Menu: My Folders, My Queries, Common Queries, My Layouts, Export, Open Issue, Go, Create New Issue

Options	Issue No	Requester	Issue Type	Location	Priority	Received Date	Summary
	1	Adam Cox	Incident	Kansas City	High	3/13/2010 11:07:35 AM	My anti-virus has expired on my laptop.
	3	Adam Cox	Incident	Kansas City	High	3/13/2010 11:10:14 AM	New Employee needs Network Login Privilege
	9	Henry Canova	Service Request	Kansas City	Medium	1/5/2011 11:21:54 AM	I need Power Point installed on my PC to con
	10	Walter Cobb	Service Request	Kansas City	High	1/5/2011 11:30:36 AM	Unable to import excel files into the accountir

Status Bar: 1 - 4 (of 4 total), << First < Previous | Next > Last >>, 10 Per Page, Automatically refresh every 0 Minutes, Refresh

Each region will be described in detail in the following sections. Note that many tasks in Help Desk Authority for Web can be accomplished through multiple methods. Over time, you will develop methods and custom screens that are the most efficient for your particular organization.

## Main Menu

The Main menu displays the Help Desk Authority for Web menus. These menus contain all of the tasks available in Help Desk Authority for Web.



When you select a menu item, a list of commands is displayed. For example, when the Common Queries menu item is selected, the following list of commands is presented.

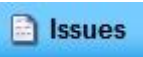








## The Toolbar

The Toolbar contains icons that enable you to access the commands that are used most frequently by Help Desk Authority for Web Users. When you select an icon from the Toolbar, the command is executed in the same way it would be if chosen from a menu.



The icons on the Toolbar perform the following functions:

Toolbar Icon	Function
	<b>Issues</b> – Displays the Issue list and corresponding menu and filter options.
	<b>Assets</b> – Displays the Asset list and corresponding menu and filter options.
	<b>Reports</b> – Opens the Reports window, allowing you to perform any reporting function in Help Desk Authority for Web for Web.

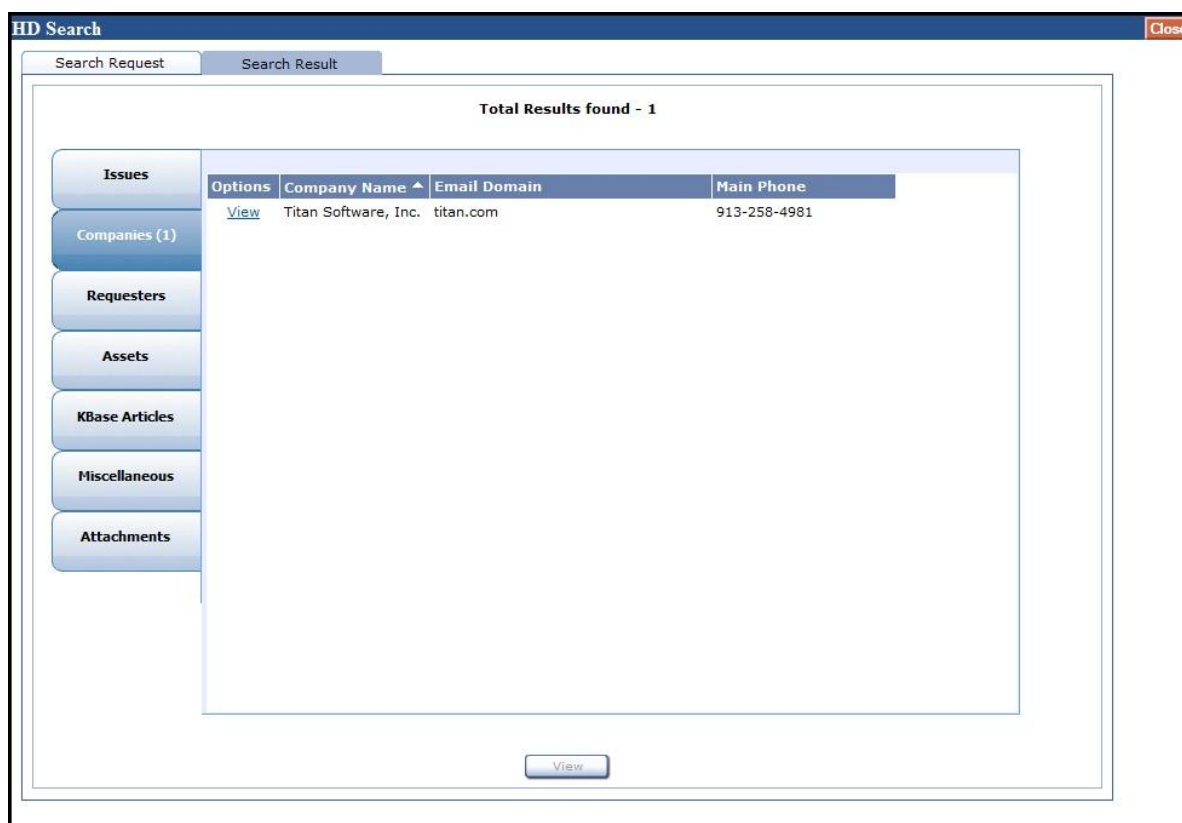
 <b>Dashboard</b>	<b>Dashboard</b> – Opens the Dashboard where you can view, edit, add and create custom widgets based on Queries.
 <b>KBase</b>	<b>Knowledge Base</b> – Opens the Knowledge Base window and allows you to search for KB articles.
 <b>Query</b>	<b>Query</b> – Opens the Query window that is very similar to HAD for Windows.
 <b>Admin</b>	<b>Administration</b> – Opens the Administration window. From here, you can complete tasks in Requester Management, Asset Management, Issue Management, Configuration, Customization and Security.

## The Search Feature

The Search functionality of Help Desk Authority for Web is located to the right of the toolbar as shown below.



Entering text in the search box and clicking the **Search** button will open the HDSearch window as shown below. This server module will allow you to search all of Help Desk Authority for Web from one simple window containing very powerful search capabilities. The capabilities of HDSearch are explained in detail in the HDSearch User Manual.



## The Issue / Asset List

The list grid is the largest section of the main window. Displayed in this section will be Issue lists, Asset lists or Knowledge Base Article lists, depending on the selection in the Navigation pane. The example below shows an Issue list.

Options	Issue No	Requester	Issue Type	Location	Priority	Received Date	Summary
	1	Adam Cox	Incident	Kansas City	High	3/13/2010 11:07:35 AM	My anti-virus has expired on my laptop.
	2	Adam Cox	Incident	Kansas City	High	3/13/2010 11:10:14 AM	New Employee needs Network Login Privilege
	2	Henry Canova	Service Request	Kansas City	Medium	1/5/2011 11:21:54 AM	I need Power Point installed on my PC to con
	10	Walter Cobb	Service Request	Kansas City	High	1/5/2011 11:30:36 AM	Unable to import excel files into the accounti

Issue lists and Asset lists can be customized by using the custom list layout option located under Administration (the **Administration** button). Each list layout can be modified to fit the needs of the user.

## Data Entry

The data entry windows in Help Desk Authority for Web are designed for simplicity and efficiency. You will have control over the amount of information collected, and very few fields are required.

Most Help Desk Authority for Web data entry forms are accessed through the Administration window (accessed via the **Admin** icon in the Toolbar). When you select a command, a selection window is presented, as shown in the New Requesters window below:

**New Requester** Close

**Requester**

Requester Name  ☐ Inactive

**General** **Custom Fields** **HDAccess** **Assets** **Attachments** **Contracts** **Products**

Company

Location Name

Department

Address 1

Address 2

City

State/Province

Postal Code

Country

Requester Code

Title

Primary Phone

Secondary Phone

Mobile Number

Fax Number

Email

Issue History

Comments

All required fields are flagged with a red asterisk. Upon completion of the data entry form, click the **OK** button. The record will be saved, and you will be returned to the previous screen.

## Selection Lists

Certain Help Desk Authority for Web windows allow the selection of multiple items. For example:

- The Groups and Privileges window allows for the selection of multiple privileges to be permitted for a Group, and multiple Users can be assigned to that Group.
- The Linked Products tab in the Contracts window allows the linking of multiple Products to a Contract.
- The Issue Report tab in the Email Template window allows the selection of multiple Issue fields to define an Issue report.







In addition to multiple selections, certain windows will allow you to choose the order in which the selections appear. An example of a selection list is below.

The screenshot shows the 'Groups and Privileges' window. At the top, there is a title bar with 'Groups and Privileges' and a 'Close' button. Below the title bar, there is a section for 'Help Desk' with a description: 'Field calls from the internal employees regarding their computer equipment'. Below this, there is a list of groups, with 'Admin' selected. The description for 'Admin' is 'Person(s) responsible for managing the Help Desk Authority Software'. To the right of the list, there are up and down arrow buttons. Below the list, there are 'Add', 'Edit', and 'Delete' buttons. The main area of the window is divided into four sections: 'Privileges Revoked from Group', 'Privileges Allowed for Group', 'Users not in Group', and 'Users in Group'. Each section has a list of items and buttons to move items between sections. Red arrows indicate the flow of items between the sections. At the bottom right, there are 'Save' and 'Cancel' buttons.

Privileges Revoked from Group	Privileges Allowed for Group
Asset.Add	Asset.Edit
Asset.Delete	Asset.Search
AssetManufacturer.Add	AssetManufacturer.Delete
AssetManufacturer.Edit	AssetManufacturer.Search
AssetTemplate.Add	AssetTemplate.CreateAsset
AssetTemplate.Edit	AssetTemplate.Delete
AssetTemplate.Search	
AssetTypes.Add	
AssetTypes.Delete	

Users not in Group	Users in Group
Helpdesk Administrator	John Smith
	Mary Jones

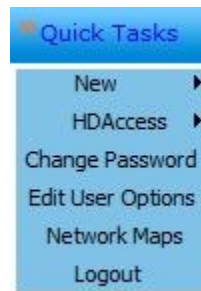
Items on each side of the list window can be moved to the opposite side by using the arrow buttons as described below.

Button	Action
	Move selected item to the right
	Move all items to the right
	Move selected item to the left
	Move all items to the left
	Move selected item up one spot on the list
	Move selected item down one spot on the list

Once all items are in the correct location, click the **Save** button.

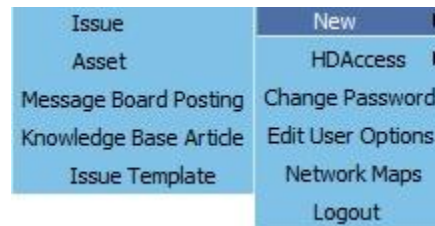
## Quick Tasks

Under the Search window is the Quick Tasks menu shown below. It will allow you to jump to common tasks in Help Desk Authority for Web very quickly.



## New

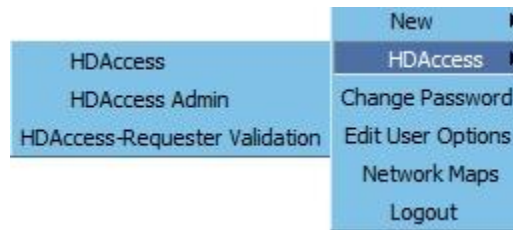
The New option displays the sub-menu below.



Sub-menu Item	Task
Issue	Opens the New Issue window for the creation of a new Issue.
Asset	Opens the New Asset window for the creation of a new Asset.
Message Board Posting	Opens the Add Message window for the creation of a new message.
Knowledge Base Article	Opens the Add KBase Article window for the creation of a new Knowledge Base Article.
Issue Template	Opens the Add Issue Template window for the creation of a new Issue template.

## HDAccess

The HDAccess option displays the following sub-menu.



Sub-menu Item	Task
HDAccess	Opens a new window containing HDAccess
HDAccess Admin	Opens a new window containing HDAccess for Administrators
HDAccess-Requester Validation	Opens the Registered Requesters screen in Help Desk Authority for Web

### Change Password

Opens the Change Password window and allows you to change your password for logging into Help Desk Authority for Web.

### Edit User Options

Opens the Edit User Options window where you can change your email settings, warning messages, Requester and Company Search Preferences, New Issue Assigned User option, Issue Status Change option and Dashboard alerts.

### Network Maps

Displays the Network Maps as defined in PacketTrap if PacketTrap has been integrated with Help Desk Authority (for Windows).

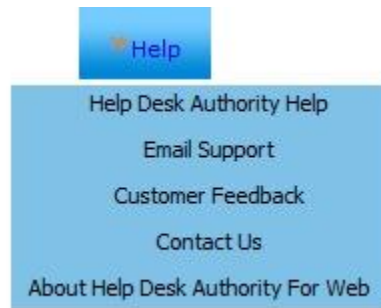
### Logout

Logs the user out of Help Desk Authority for Web.



## Help

The Help menu, located next to the Quick Tasks menu, will allow you to access assistance in any way you like.



Menu Option	Task
Help Desk Authority Help	Opens a PDF document containing the Help Desk Authority for Web User Manual
Email Support	Opens your email client and addresses an email to <a href="mailto:hdasupport@scriptlogic.com">hdasupport@scriptlogic.com</a> with a subject of "HD Authority for Web Feedback"
Customer Feedback	Opens the ScriptLogic Product Feedback Page for submitting your feedback on Help Desk Authority and other ScriptLogic products.
Contact Us	Opens the ScriptLogic Contact Us page.
About Help Desk Authority for Web	Displays the latest version and build information, as well as local and network database names being used.

## Chapter 2 - Administration

Administration, available through the **Admin** button on the toolbar, manages the items used in creating Issues in Help Desk Authority. Selecting **Admin** opens the Administration window as shown below with the sidebar navigation in the red frame.

**HELP DESK AUTHORITY**

Issues Assets Reports Dashboard KBase Query **Admin** Search

Quick Tasks Help Logout

**Requester Management**

- Requesters
- Companies
- Requester Validation

**Asset Management**

- Asset Templates
- Asset Types
- Asset Manufacturers
- Asset Vendors

**Issue Management**

- Issue Templates
- Issue Activity
- Issue Category
- Issue Sub-Status
- Issue Types
- Priority Mapping

**Configuration**

- System Options
- Message Board
- Products
- Support Contracts
- Holidays
- Operating Hours

**Customization**

- Custom Fields
- Issue List Layouts

**Security**

- Users
- Groups and Privileges

**Find a Requester**

Note: Enter full or partial search criteria and click Search button.

Search Requester Name Search Reset Show More Options Create New Requester

Options	Requester Name	Company Name	Email	Primary Phone	City	State/Province	Postal Code	Country
	Adam Cox	Titan Software, Inc.	acox@titan.com	913-258-4981	Kansas City	KS	66101	USA
	Alicia Lawson	Titan Software, Inc.	alawson@titan.com	207-655-7199				USA
	Allan Brentley	Titan Software, Inc.	abrentley@titan.com	515-374-0161				USA
	Andrew Swanson	Titan Software, Inc.	aswanson@titan.com	402-673-5567				USA
	Anna Mardell	Titan Software, Inc.	amardell@titan.com	317-863-5727				USA
	Arthur Flynn	Titan Software, Inc.	aflynn@titan.com	859-863-5448				USA
	Barbara Summerville	Titan Software, Inc.	bsummerville@titan.com	312-372-1059				USA
	Beverly Olson	Titan Software, Inc.	bolson@titan.com	225-823-7803				USA
	Brenda Ingram	Titan Software, Inc.	bingram@titan.com	303-678-5966				USA
	Brenda Jackson	Titan Software, Inc.	bjackson@titan.com	617-653-7120				USA

1 - 10 (of 100 total) << First < Previous | Next > Last >>

10 Per Page

In the Administration window you can:

- Manage Requesters and Companies
- Perform searches
- Manage Assets
- Manage Issues
- Configure the Help Desk Authority system
- Customize Help Desk Authority
- Configure security

In this section, we will cover all of the above in detail.

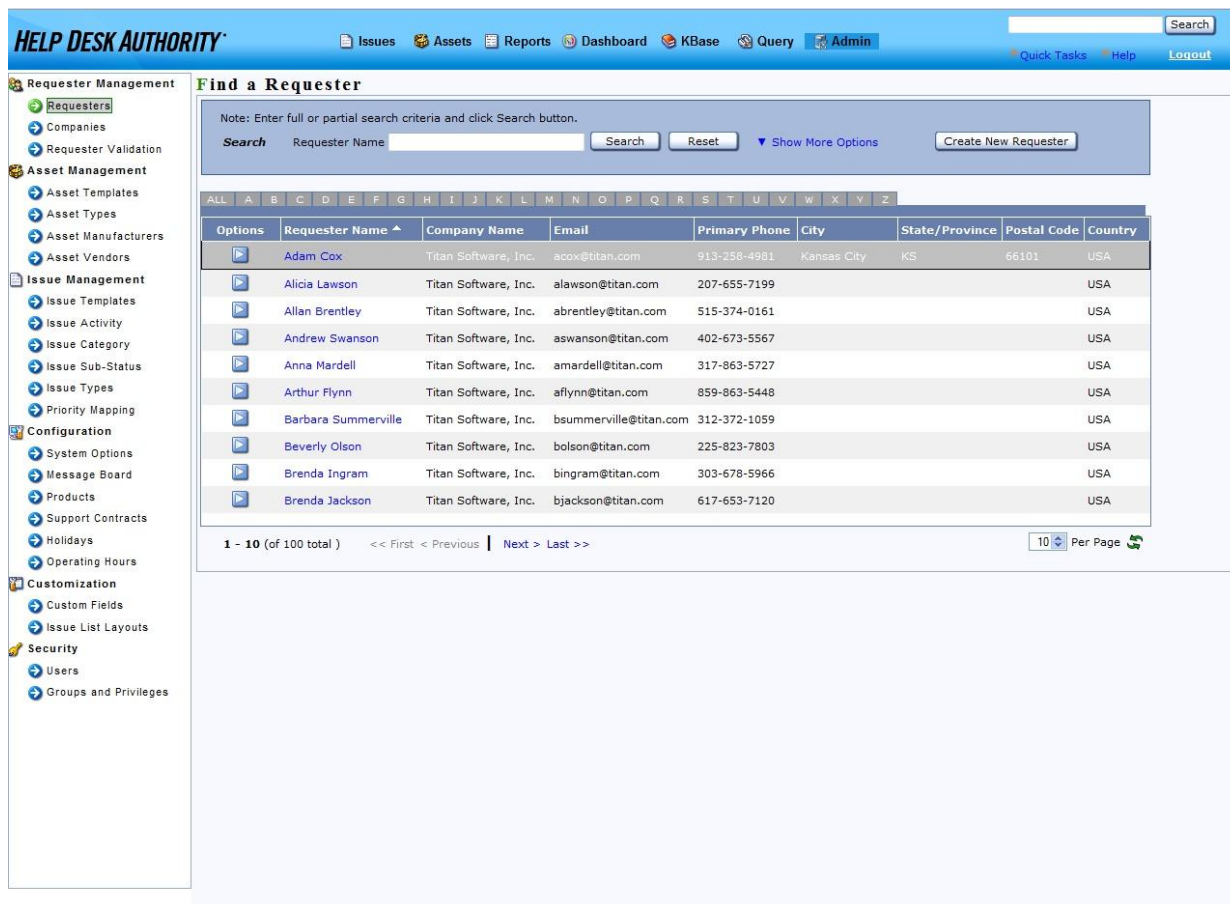
## Requester Management

In this section, we will cover methods of searching for and creating a Requester or Company.

### Requesters

Requesters—formerly referred to as customers in previous versions of Help Desk Authority—are those individuals calling your help desk for assistance. These are the actual individuals who you will be dealing with every day through your help desk.

The Requesters screen in the Administration window is shown below.



The screenshot displays the 'HELP DESK AUTHORITY' web application interface. The top navigation bar includes links for Issues, Assets, Reports, Dashboard, KBase, Query, and Admin. The sidebar on the left lists various management categories: Requester Management (with sub-links for Requesters, Companies, and Requester Validation), Asset Management (with sub-links for Asset Templates, Asset Types, Asset Manufacturers, and Asset Vendors), Issue Management (with sub-links for Issue Templates, Issue Activity, Issue Category, Issue Sub-Status, Issue Types, and Priority Mapping), Configuration (with sub-links for System Options, Message Board, Products, Support Contracts, Holidays, and Operating Hours), Customization (with sub-links for Custom Fields and Issue List Layouts), and Security (with sub-links for Users and Groups and Privileges).

The main content area is titled 'Find a Requester' and features a search form with a 'Search' button and a 'Reset' button. Below the search form is a table listing requesters. The table has columns for Options, Requester Name, Company Name, Email, Primary Phone, City, State/Province, Postal Code, and Country. The table contains 10 rows of data, all from 'Titan Software, Inc.'.

Options	Requester Name	Company Name	Email	Primary Phone	City	State/Province	Postal Code	Country
	Adam Cox	Titan Software, Inc.	acox@titan.com	913-258-4981	Kansas City	KS	66101	USA
	Alicia Lawson	Titan Software, Inc.	alawson@titan.com	207-655-7199				USA
	Allan Brentley	Titan Software, Inc.	abrentley@titan.com	515-374-0161				USA
	Andrew Swanson	Titan Software, Inc.	aswanson@titan.com	402-673-5567				USA
	Anna Mardell	Titan Software, Inc.	amardell@titan.com	317-863-5727				USA
	Arthur Flynn	Titan Software, Inc.	aflynn@titan.com	859-863-5448				USA
	Barbara Summerville	Titan Software, Inc.	bsummerville@titan.com	312-372-1059				USA
	Beverly Olson	Titan Software, Inc.	bolson@titan.com	225-823-7803				USA
	Brenda Ingram	Titan Software, Inc.	bingram@titan.com	303-678-5966				USA
	Brenda Jackson	Titan Software, Inc.	bjackson@titan.com	617-653-7120				USA

At the bottom of the table, there is a pagination control showing '1 - 10 (of 100 total)' and a 'Per Page' dropdown set to 10.

## Searching for a Requester

There are several ways to search for a Requester from the Requesters screen. You can search on a Requester using any criterion listed below, or a combination of criteria to narrow your results if desired. The search section of the Requesters screen is shown below.

### Find a Requester

Note: Enter full or partial search criteria and click Search button.

▲ Hide More Options   [Create New Requester](#)

Requester Name	<input type="text"/>	Primary Phone	<input type="text"/>	Postal Code	<input type="text"/>
<a href="#">Company Name</a>	<input type="text"/>	City	<input type="text"/>	Country	<input type="text"/>
Email	<input type="text"/>	State/Province	<input type="text"/>	<input type="button" value="Search"/>	<input type="button" value="Reset"/>

1. Enter any known values for the Requester you are attempting to locate.
2. Click the **Search** button.
3. If you need to reset the form, use the **Reset** button at any time.

## Creating a New Requester

If you need to create a new Requester, you can do so from the Administration window in the Requesters screen. Simply click the **Create New Requester** button to open the New Requester window as shown below.

**New Requester** Close

---

**Requester**

Requester Name  ☐ Inactive

**General** Custom Fields HDAccess Assets Attachments Contracts Products


<a href="#">Company</a> <input type="text"/>	Requester Code <input type="text"/>
Location Name <input type="text"/>	Title <input type="text"/>
Department <input type="text"/>	Primary Phone <input type="text"/>
Address 1 <input type="text"/>	Secondary Phone <input type="text"/>
Address 2 <input type="text"/>	Mobile Number <input type="text"/>
City <input type="text"/>	Fax Number <input type="text"/>
State/Province <input type="text"/>	Email <input type="text"/>
Postal Code <input type="text"/>	
Country <input type="text"/>	

Issue History

Comments

The first tab in the Requester – Add window is the General tab. Above the tabs is the **Requester Name** field.

To add a new Requester, follow the steps below.

1. Enter the name of the Requester in the **Requester Name** field.
2. In the **Company Name** field, you can select a Company or create a new one. To select an existing Company, click the **Company Name** link. This will open the Companies window, where you can select a Company or create a new one. After selecting or creating a Company, the Company will now be attached to the new Requester, and the Company information fields will be automatically populated with the existing Company information. To clear the Company information fields, click the .
3. Enter the location name in the **Location Name** field if it isn't already populated.
4. If the new Requester is part of a Company department, select the department name in the **Department** drop-down menu.
5. Enter the address in the **Address 1** and **Address 2** fields.
6. Enter the city name in the **City** field.
7. Enter the state or province in the **State/Province** field.
8. Enter the postal code in the **Postal Code** field.
9. Enter the country in the **Country** field.
10. Enter the Requester code in the **Requester Code** field. The Requester code should follow your organization's guidelines for Requester codes if they are available.
11. Enter the title of the Requester in the **Title** field. For example, "VP of Sales".
12. Enter the primary phone number in the **Primary Phone** field.
13. Enter the secondary phone number in the **Secondary Phone** field.
14. Enter the mobile phone number in the **Mobile Number** field.
15. Enter the fax number in the **Fax Number** field.
16. Enter the email address in the **Email** field.
17. When creating a new Requester, the **Issue History** drop-down is grayed out as there are no current or past Issues with a new Requester. This field can be ignored.
18. Enter any comments regarding the new Requester in the **Comment** field.

The next tab in the Requester – Add window is the Custom Fields tab. If you have created any custom fields for Requesters, they will appear under this tab. We will cover more on creating custom fields in the Customization section of this chapter.

Following the Custom Fields tab is the HDAccess tab shown below. If you will be granting HDAccess login privileges to the new Requester, take the following steps in this tab.

The screenshot shows the 'New Requester' dialog box with the 'HDAccess' tab selected. The 'Requester' section at the top has a 'Requester Name' field and an 'Inactive' checkbox. Below this is a tabbed interface with 'General', 'Custom Fields', 'HDAccess', 'Assets', 'Attachments', 'Contracts', and 'Products'. The 'HDAccess' tab contains a checkbox for 'Grant Requester HDAccess Login Privileges'. If checked, it reveals a sub-form with 'Logon Name' and 'Password' fields, and several checkboxes: 'Cannot Change Password', 'Must Change Password', 'Active Directory User', 'Disable single signon', 'View Company Issues', 'View Department Issues', and 'View Location Issues'. A 'Last Login' field is also present. At the bottom are 'Save' and 'Cancel' buttons.

1. Click the **Grant Requester HDAccess Login Privileges** checkbox.
2. Enter the login name in the **Login Name** field.
3. Enter the password in the **Password** field.
4. If the changing of passwords will be handled by the Administrator and not the Requester, check the **Cannot Change Password** checkbox.
5. If the Requester will be required to change his password, check the **Must Change Password** checkbox.
6. If you want the Requester to be able to view all Company Issues, check the **View Company Issues** checkbox.
7. If you want the Requester to be able to view all department Issues, check the **View Department Issues** checkbox.
8. If you want the Requester to be able to view all location Issues, check the **View Location Issues** checkbox.
9. If the new Requester has been created using HDSync, the **Active Directory User** checkbox will automatically be checked. Otherwise, this field will always be unavailable.
10. If the Active Directory User checkbox is checked, the **Disable Single Signon** can be checked or unchecked depending upon Administrator preference regarding this Requesters

use of single signon. If the **Active Directory User** checkbox is not checked, this option will also be unavailable.

11. The **Last Login** field will be automatically populated with the last login date and time of the Requester.

The Asset tab is the next tab in the Requester – Add window. This tab is where you will assign Assets to an individual Requester.

**Edit Requester** [Close]

**Requester**

Requester Name: Edwin Williams [Inactive]

General Custom Fields HDAccess **Assets** Attachments Contracts Products

Current Default Asset: (None) [Set Selected as Default] [Clear Default]

Asset Name	Asset Type	Asset Tag
Canon Printer - 4th Floor	Printer	PRINTER4205
HP Printer	Desktop Computer	HP Printer
HP Scanner	Desktop Computer	

1 - 3 (of 3 total) << First < Previous | Next > Last >>

[Add] [Edit] [Delete]

[Save] [Cancel]

To add an Asset or Assets to a new Requester:

1. Click the **Add** button. This will open the Assets window, providing a list of Assets to choose from to add to the Requester. If the new Requester information has not yet been saved, you will be presented with an alert informing you that a save is required. Click the **OK** button. If this alert does not appear, proceed to step 2.
2. Click the Asset name on the Asset you wish to add to the Requester.
3. The Asset will now appear in the Asset list under the Asset tab of the Requester.



The next tab in the Requester – Add window is the Attachments tab. If you would like to attach any files to a Requester, follow the steps outlined below.

1. If you would like to browse your system for a file to attach, click the **Browse** button. This will open up a Windows Explorer window. Simply browse to the file you wish to attach, then click the **Open** button. The attached file will appear in the **Select File** field.
2. Click the **Attach File** button. The file will now be attached to the Requester record and will appear in the attachments list. In the example below, an image file has been added.

**Edit Requester** Close

**Requester**

Requester Name:  ☐ Inactive

**General** **Custom Fields** **HDAccess** **Assets** **Attachments** **Contracts** **Products**

Select File:  Browse... Attach File Attach URL

Options	File Name
	1.jpg

Save Cancel



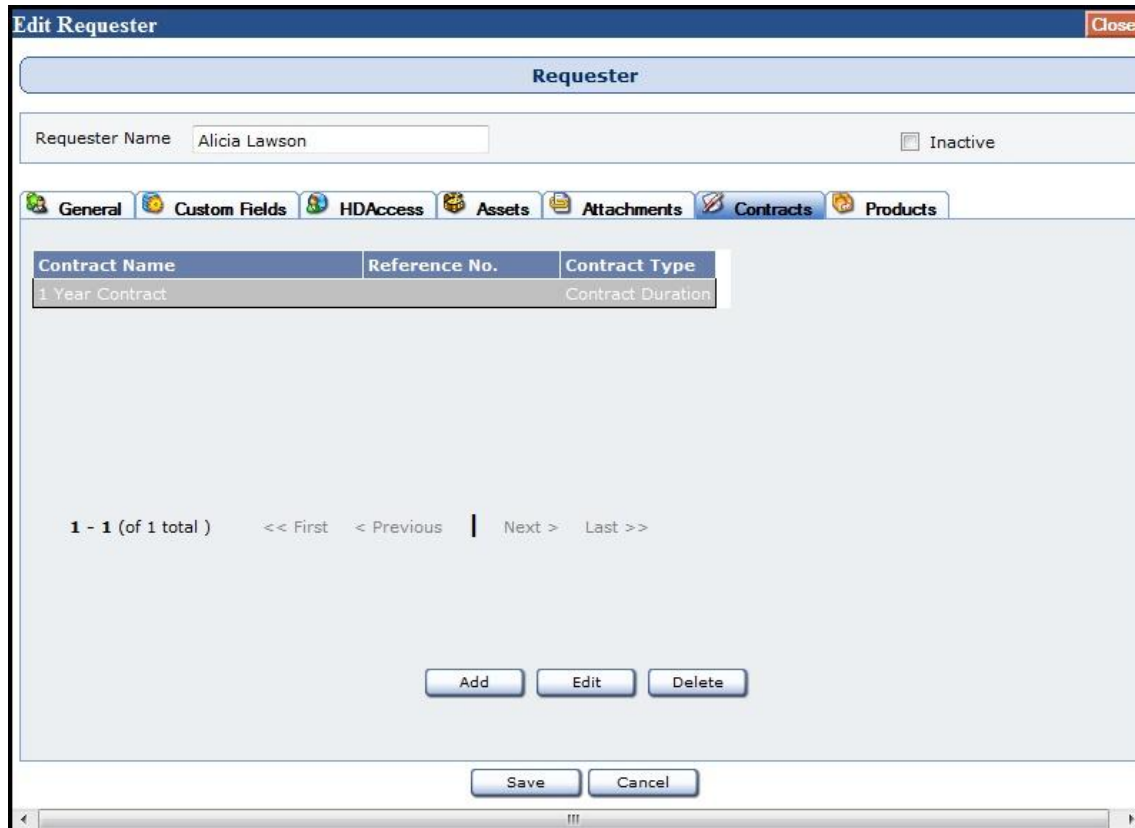
3. If you would like to attach a URL (website address) to a Requester, click the **Attach URL** button. This will open the Attach URL window shown below. Enter the web address in the **Web Address** field and the description in the **Description** field. (Both fields are required.)



The 'Attach URL' dialog box has a title bar with 'Attach URL' and a 'Close' button. Below the title bar is a header area with 'Attach URL'. The main area contains two text input fields: 'Web Address' with the value 'www.scriptlogic.com' and 'Description' with the value 'Point. Click. Done!'. At the bottom right are 'Save' and 'Cancel' buttons.

4. Click the **Save** button.

The next tab in the Requester – Add window is the Contracts tab. From here you can associate a specific Contract to the new Requester.



The 'Edit Requester' dialog box has a title bar with 'Edit Requester' and a 'Close' button. Below the title bar is a header area with 'Requester'. The main area contains a 'Requester Name' field with the value 'Alicia Lawson' and an 'Inactive' checkbox. Below this is a tabbed interface with tabs for 'General', 'Custom Fields', 'HDAccess', 'Assets', 'Attachments', 'Contracts', and 'Products'. The 'Contracts' tab is selected, showing a table with columns 'Contract Name', 'Reference No.', and 'Contract Type'. The table contains one row: '1 Year Contract' and 'Contract Duration'. Below the table is a pagination bar showing '1 - 1 (of 1 total)' and navigation buttons '<< First', '< Previous', 'Next >', and 'Last >>'. At the bottom are 'Add', 'Edit', and 'Delete' buttons, and 'Save' and 'Cancel' buttons.

Contract Name	Reference No.	Contract Type
1 Year Contract		Contract Duration

To associate a Contract to a Requester:

1. Click the **Add** button. This will open the Requester Contract – Add window.
2. Under the General tab, select the Contract you wish to assign to the Requester from the Contract List drop-down menu. The Contract Name field will self-populate
3. Enter the cost in the **Cost** field if known.
4. Enter the percentage of the contract to be used before a warning is issued in the **Warning %** field.
5. Check the **Warranty** checkbox if this is a warranty contract.
6. Enter the reference number in the **Reference No** field if necessary.
7. Add any comments in the **Comments** field
8. The **Start Date** and **End Date** fields will be automatically populated if the Contract is based upon duration. If you are using another type of Contract, and you wish to include start and end dates, select both dates from the **Start Date** and **End Date** drop-down menus.
9. If you wish to link any Products to the Contract, click on the Linked Products tab of the Requester Contract – Add window. Available Products will be listed in the Available Products selection list. Use the arrow keys to add or remove Products to the Products Linked to this Contract selection list on the right.
10. If desired, this Contract can be linked to the Requester but not activated. If you would like to deactivate the Contract (but retain the link to the Requester), check the **Inactive** checkbox.
11. Click the **Save** button when finished.
12. Once a Contract is linked to a Requester, it can be edited or deleted using the **Edit** or **Delete** buttons.

The final tab in the Requester – Add window is the Products tab. From this tab, you can add Products to a Requester. The Products tab is shown below.

The screenshot shows the 'Edit Requester' window with the 'Products' tab selected. The window title is 'Edit Requester' with a 'Close' button. Below the title bar is a 'Requester' section containing a text field for 'Requester Name' with the value 'Anna Mardell' and an 'Inactive' checkbox. A tabbed interface below shows 'General', 'Custom Fields', 'HDAccess', 'Assets', 'Attachments', 'Contracts', and 'Products' (selected). The 'Products' tab displays a table with columns 'Product Name', 'Reference No.', and 'PO No.'. The table contains two rows: 'X-Track Financial' and 'X-Track Purchasing'. Below the table is a pagination control showing '1 - 2 (of 2 total)' and navigation buttons '<< First', '< Previous', 'Next >', and 'Last >>'. At the bottom of the window are buttons for 'Add', 'Edit', 'Delete', 'Save', and 'Cancel'.

Product Name	Reference No.	PO No.
X-Track Financial		
X-Track Purchasing		

To add a product to a Requester:

1. Click the **Add** button. This will open the Requester Product window.
2. Select a product from the **Product List** drop-down menu.
3. The Product Name, Manufacturer, Manufacturer Info and Product Info fields will be auto-populated.
4. Enter a reference number in the **Reference No** field if needed.
5. Enter a purchase order number in the **PO No** field if needed.
6. Enter any comments in the **Comments** field.
7. Click the **Save** button when finished. The Product will now be associated with the Requester.

A Product in the list can be edited or deleted by selecting the product then using the **Edit** button (opens the Requester Product – Edit window) or the **Delete** button.

To finish setting up a new Requester:

1. Click the **Save** button in the Requester – Add window.
2. Decide if the Requester will initially be active or inactive. If inactive, check the **Inactive** checkbox to the right of the **Requester Name** field. Otherwise, leave the box unchecked.
3. The new Requester will appear in the Requester list on the main screen of the Administration window when Requesters is selected in the navigation pane.
4. Requesters can be modified or deleted at any time by using the **Modify** and **Delete** buttons located at the bottom of the window.

## Companies

In Help Desk Authority, Companies are the entities that employ your Requesters. Not all Requesters may be affiliated with a Company, but when they are, you can capture pertinent Company information that can be linked to your Requester records.

Although the only required information about a Company is its name, the more information you enter, the better Help Desk Authority will be able to provide a complete profile when you need it.

The Company screen of the Administration window is shown below.

**HELP DESK AUTHORITY** Issues Assets Reports Dashboard KBase Query Admin Search

Quick Tasks Help Logout

**Requester Management**

- Requesters
- Companies**
- Requester Validation

**Asset Management**

- Asset Templates
- Asset Types
- Asset Manufacturers
- Asset Vendors

**Issue Management**

- Issue Templates
- Issue Activity
- Issue Category
- Issue Sub-Status
- Issue Types
- Priority Mapping

**Configuration**

- System Options
- Message Board
- Products
- Support Contracts
- Holidays
- Operating Hours

**Customization**

- Custom Fields
- Issue List Layouts

**Security**

- Users
- Groups and Privileges

**Find a Company**

Note: Enter full or partial search criteria and click Search button. Hide More Options Create New Company

Company Name Main Phone Postal Code

Company Code City

Email Domain State Search Reset

ALL A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Options	Company Name	City	Main Phone	Email Domain	Requester Name(s)
	Buzard's Bullfrogs	Lexington	330-785-8869	buzardsfrogs.com	No Requesters have been assigned to Buzard's Bullfrogs
	Titan Software, Inc.	Kansas City	913-258-4981	titan.com	Henry Canova; Terry Carrick; Walter Cobb...(See All 101)

1 - 2 (of 2 total) << First < Previous | Next > Last >>

20 Per Page

## Searching for a Company

There are several ways to search for a Company from the Company screen. You can search on a Company using any criterion listed below, or a combination of criteria to narrow your results if desired. The search section of the Company screen is shown below.

**Find a Company**

Note: Enter full or partial search criteria and click Search button. [▲ Hide More Options](#) [Create New Company](#)

Company Name	<input type="text"/>	Main Phone	<input type="text"/>	Postal Code	<input type="text"/>
Company Code	<input type="text"/>	City	<input type="text"/>		
Email Domain	<input type="text"/>	State	<input type="text"/>	<input type="button" value="Search"/>	<input type="button" value="Reset"/>

1. Enter any known values for the Company you are attempting to locate.
2. Click the **Search** button.
3. If you need to reset the form, use the **Reset** button at any time.

Although you can search for a company using any of the available criterion, it is not necessary to enter any data at all. To attain a list of all available Companies, simply click the Search button. The entire list of available Companies will be presented in the search results window

## Creating a New Company

If you need to create a new Company, you can do so from the Administration window in the Company screen. Simply click the **Create New Company** button to open the New Company window as shown below.

**New Company** Close

**Company**

Company Name  ☐ Inactive

**General** **Custom Fields** **Requesters** **Locations** **Departments** **Contracts** **Products** **Assets** **Attachments**

Company Code  Location

Main Phone

Main Fax

Email Domain

HDAccess Layout

☐ Billable

Issue History

Comments

The first tab in the Company – Add window is the General tab. The **Company Name** field is located above the 9 tabs.

To add a new Company, follow the steps below.

1. Enter the name of the New Company in the **Company Name** field (required).
2. If you would like the new Company to be inactive initially, check the **Inactive** checkbox.
3. Enter the Company code in the **Company Code** field. The Company code should follow your organization's guidelines for Company codes if they are available.
4. Enter the main phone number in the **Main Phone** field.
5. Enter the main fax number in the **Main Fax** field.
6. Enter the email domain in the **Email Domain** field.
7. If you have previously set up an HDAccess layout that you would like to use for this new Company, select it from the **HDAccess Layout** drop-down menu.
8. Select the default location from the **Default Location** drop-down menu if there is more than one location associated with this new Company. Locations are added in the Locations tab. If you add a location when adding a new Company, you can go back to the General tab and select a default location. By default, this field is blank.
9. When creating a *new* company, the **Issue History** drop-down is grayed out as there are no current or past Issues with a new company. This field can be ignored.
10. Enter any comments regarding the new Company in the **Comment** field.

The next tab in the Company – Add window is the Custom Fields tab. If you have created any custom fields for Companies, they will appear under this tab. We will cover more on creating custom fields in the Customization section of this chapter.

The next tab in the Company – Add window is the Requesters tab. Similar to the company's tab in the Requester – Add window, this tab is where you will link Requesters to a Company.

By default, no Requesters are listed. They must be added. To add a Requester to be linked to the new Company, click the **Add** button.

The screenshot shows the 'Edit Company' window with the 'Requesters' tab selected. The window title is 'Edit Company' with a 'Close' button in the top right. Below the title bar is a 'Company' section with a text field for 'Company Name' containing 'Buzard's Bullfrogs' and an 'Inactive' checkbox. Below this is a tabbed interface with tabs for 'General', 'Custom Fields', 'Requesters' (selected), 'Locations', 'Departments', 'Contracts', 'Products', 'Assets', and 'Attachments'. The 'Requesters' tab displays a table with the following data:

Requester Name	Email	Primary Phone	City	State/Province	Postal Code
Steve J			Lexington	KY	40502

Below the table is a horizontal scrollbar. At the bottom of the table area, it says '1 - 1 (of 1 total)' and navigation links: '<< First', '< Previous', 'Next >', and 'Last >>'. At the bottom of the window are five buttons: 'Add', 'Edit', 'Delete', 'Save', and 'Cancel'.

Clicking the **Add** button opens the Requester – Add window that you are already familiar with. Adding a Requester from this window is very similar to the basic add Requester procedure. Simply complete the fields (as outlined in the *Creating a New Requester* section), then click the **OK** button.

The next tab in the Company – Add window is the Locations tab. Here, you can add, edit and delete Company locations. We will cover each of these activities. In our example below, there are two locations.

Location Name	Address 1	Address 2	City	State/Province	Postal Code	Country
Home Office	11 Scranton Place		Tulsa	OK	44582	USA
Lexington	10781 Gilmore Drive		Lexington	KY	40502	USA

First, we will modify the location by clicking the **Edit** Button. This opens the Location – Edit window.



After the location has been edited, click the **Save** button.

Next, we will click the **Add** button again and the Location – Add window opens. The Location – Add window is exactly like the Location – Edit window. After adding a new location, click the **OK** button. In our example, two additional locations have been added. Now four locations appear in the Location list on the Locations tab.

Location Name	Address 1	Address 2	City	State/Province	Postal Code	Country
Home Office	11 Scranton Place		Tulsa	OK	44582	USA
Las Vegas Office	8893s Vista Ridge		Las Vegas	NV	89121	
Lexington	10781 Gilmore Drive		Lexington	KY	40502	USA
Pittsburgh	33 Pearl		Pittsburgh	PA		

Locations can be deleted simply by selecting the location and clicking the **Delete** button.



The next tab in the Company – Add window is the Departments tab. Here, you can add, edit or delete departments in a Company. By default, there are no departments listed in the window.

The screenshot shows the 'Edit Company' window with the 'Departments' tab selected. The 'Company Name' field contains 'Buzard's Bullfrogs' and there is an 'Inactive' checkbox. The 'Departments' tab is active, showing a table with one row: 'Sales'. Below the table are navigation buttons: '<< First', '< Previous', 'Next >', 'Last >>', 'Add', 'Edit', and 'Delete'. At the bottom are 'Save' and 'Cancel' buttons.

To add a department to your new Company, follow the steps below.

1. Click the **Add** button. This opens the Department – Add window.
2. Enter the name of the department in the **Department Name** field.
3. Click the **OK** button.

The screenshot shows the 'Department - Add' window. The 'Department Name' field contains 'Administration' and there is an 'Inactive' checkbox. At the bottom are 'Save' and 'Cancel' buttons.

The next tab in the Company-Add window is the Contracts tab. If you would like to link a Contract to the new Company, follow the steps below.

**Edit Company** [Close]

**Company**

Company Name: Buzard's Bullfrogs ☐ Inactive

General Custom Fields Requesters Locations Departments **Contracts** Products Assets Attachments

Contract Name	Reference No.	Contract Type
100 Issues Contract		Support Issues

1 - 1 (of 1 total) << First < Previous | Next > Last >>

[Add] [Edit] [Delete]

[Save] [Cancel]

1. Click the **Add** button. This will open the Company Contract – Add window.
2. Under the General tab, select the Contract you wish to assign to the Company from the **Contract List** drop-down menu.
3. The **Contract Name** field will be auto-populated.
4. Enter the cost in the **Cost** field.
5. Enter the percentage of usage that will occur before a warning is issued in the **Warning %** field.
6. Enter the reference number in the **Reference No** field if necessary.
7. Add any comments in the **Comments** field
8. The **Start Date** and **End Date** fields will be automatically populated if the Contract is based upon duration. If you are using another type of Contract, and you wish to include start and end dates, select both dates from the **Start Date** and **End Date** drop-down menus.
9. If you wish to link any Products to the Contract, click on the Linked Products tab of the Company Contract – Add window. Available Products will be listed in the **Available Products** selection list. Use the arrow keys to add or remove Products to the **Products Linked to this Contract** selection list on the right.
10. If desired, this Contract can be linked to the Company but not activated. If you would like to deactivate the Contract (but retain the link to the Company), check the **Inactive** checkbox.
11. Click the **OK** button when finished.

The next tab in the Company – Add window is the Products tab. From this tab, you can add Products to a Company. The Products tab is shown below.

**Edit Company** Close

**Company**

Company Name:  ☐ Inactive

General
Custom Fields
Requesters
Locations
Departments
Contracts
Products
Assets
Attachments

Product Name	Reference No.	PO No.
X-Track Financial		
X-Track Sales		

1 - 2 (of 2 total)    << First   < Previous   |   Next >   Last >>

To add a product to a Company:

1. Click the **Add** button. This will open the Company Product window.
2. Select a product from the **Product List** drop-down menu.
3. The **Product Name**, **Manufacturer**, **Manufacturer Info** and **Product Info** fields will be auto-populated.
4. Enter a reference number in the **Reference No** field if needed.
5. Enter a purchase order number in the **PO No** field if needed.
6. Enter any comments in the **Comments** field.
7. Click the **Save** button when finished. The Product will now be associated with the Company.

A Product in the list can be edited or deleted by selecting the product then using the **Edit** button (opens the Company Product – Edit window) or the **Delete** button.

The Asset tab is the next tab in the Company – Add window. This tab is where you will assign Assets to an individual customer.

**Edit Company** Close

**Company**

Company Name:  ☐ Inactive

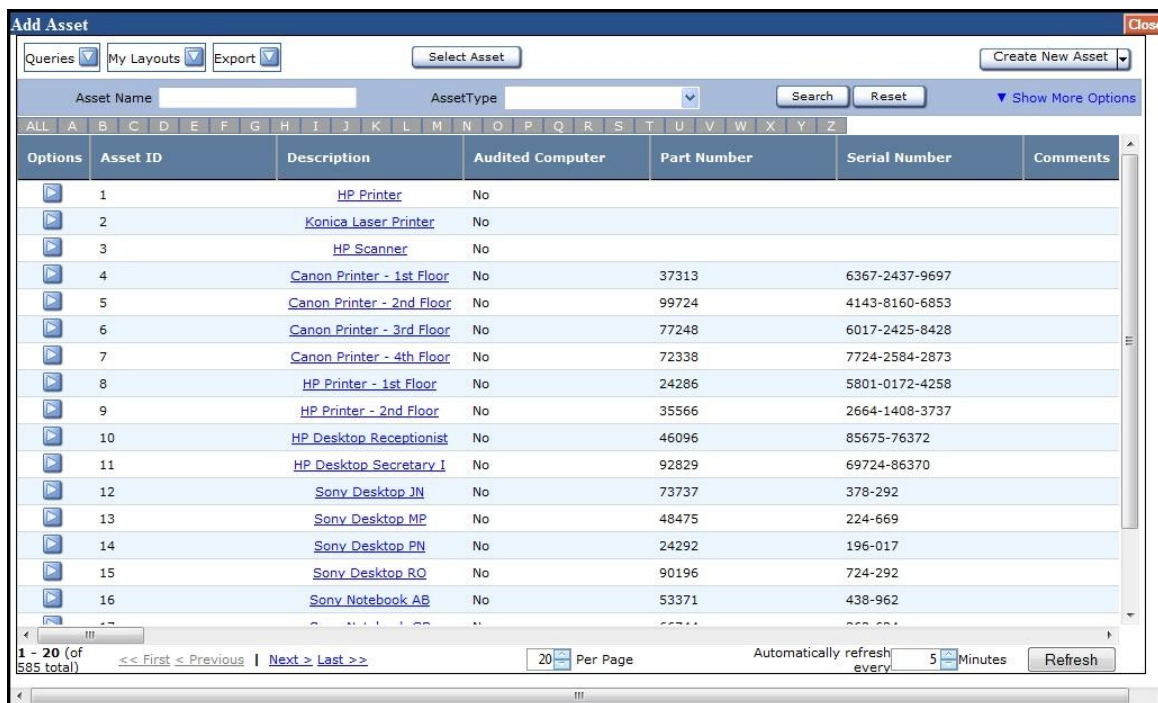
**General** **Custom Fields** **Requesters** **Locations** **Departments** **Contracts** **Products** **Assets** **Attachments**

Asset Name	Asset Type	Asset Tag	Requester Name	Active
HP Desktop Receptionist	Copier	DESKTOP7996		0
HP Scanner	Desktop Computer			0

1 - 2 (of 2 total) << First < Previous | Next > Last >>

To add an Asset or Assets to a new Company, follow the instructions below.

1. Click the **Add** button. This will open the Add Assets window as shown below.

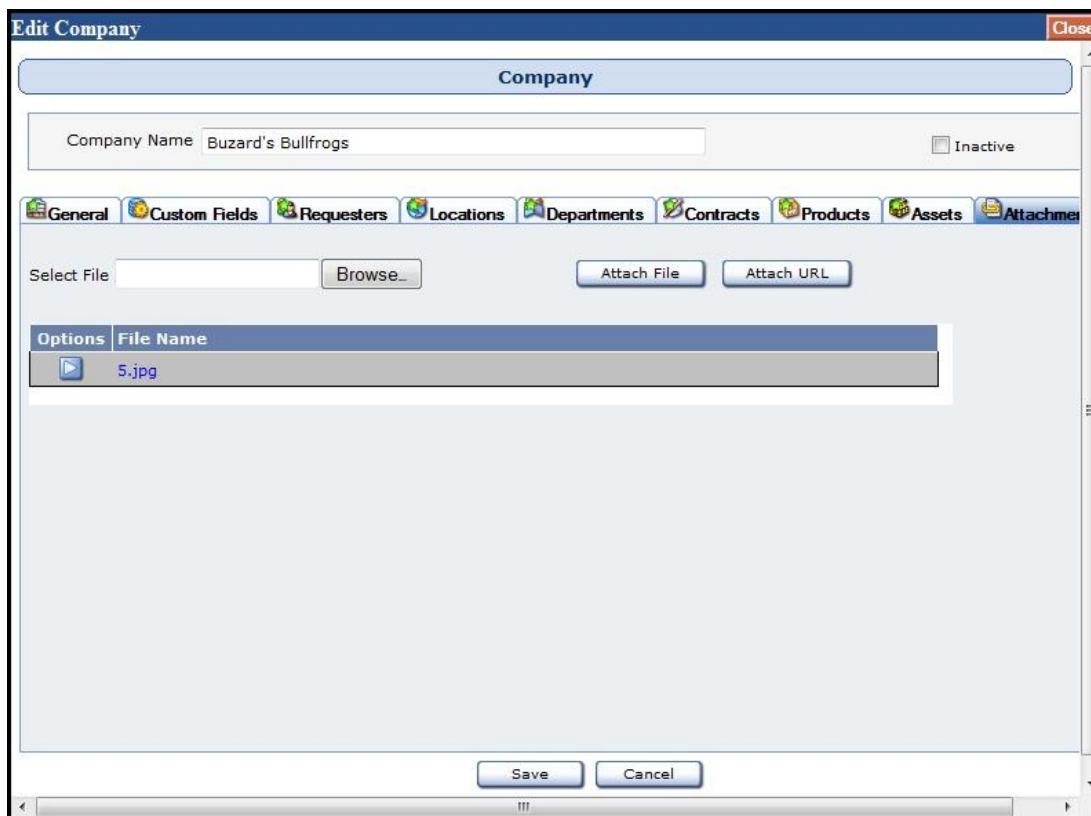



2. Click on an Asset to associate it with the Company.
3. If you would like to create a new Asset to add to the company, click the **Create New Asset** button. This will open the Asset – Add window explained later in this manual.
4. You can also select an Asset by using the button to access the context menu shown below. Choosing **Select** will add the Asset to the Company. Choosing **Delete** will delete the Asset.



5. After adding an Asset, you can edit it at any time by using the **Edit** button to open the Edit Asset window. You can also delete an asset by selecting it and clicking the **Delete** button.

The final tab in the Company – Add window is the Attachments tab. If you would like to attach any files to a Company, follow the steps outlined below.



1. If you would like to browse your system for a file to attach, click the **Browse** button. This will open up a Windows Explorer window. Simply browse to the file you wish to attach, then click the **Open** button. The attached file will appear in the **Select File** field.
2. Click the **Attach File** button. The file will now be attached to the Company record and will appear in the attachments list. In the example below, an image file has been added.
3. You can also view an Attachment by using the  button to access the context menu shown below. Choosing **View** will open the Attachment. Choosing **Delete Attachment** will delete the Attachment.



4. To attach a URL, click the Attach URL button and enter the information in the Attach URL window. Click the **Save** button.

To finish setting up a new Company:

1. Click the Save button in the Company – Add window.
2. Decide if the Company will initially be active or inactive. If inactive, check the **Inactive** checkbox to the right of the **Company Name** field. Otherwise, leave the box unchecked.
3. The new Company will appear in the Company list on the main screen of the Administration window when Companies is selected in the navigation pane.
4. Companies can be modified or deleted at any time by using the **Modify** and **Delete** buttons located at the bottom of the window.

## Requester Validation

When a Requester registers to use the HDAccess server module (by using the **Register** link on the HDAccess sign on screen), he/she will be listed in a database for HDAccess users. Each registered user must be approved or denied by the administrator. This is done in the Requester Validation window.

The screenshot shows the 'HELP DESK AUTHORITY' web application. The top navigation bar includes links for Issues, Assets, Reports, Dashboard, KBase, Query, and Admin. A sidebar on the left contains a tree view with categories like Requester Management, Asset Management, and Issue Management. The 'Requester Management' section is expanded, showing 'Registered Requesters'. A table lists five requesters with columns for Name, Company Name, Email, Primary Phone, Logon Name, Issues, and Last Login. A 'Refresh' button is at the top right of the table. Below the table, pagination shows '1 - 5 (of 5 total)' and navigation links for first, previous, next, and last.

Requester Name	Company Name	Email	Primary Phone	Logon Name	Issues	Last Login
David Binghamton	ACME Products	db@acme.com		dbing	0	
Curtis Mosier	Red Flag, Inc.	cmo@redflag.net		cmosier	0	
Bill Stafford	Stafford Steaks	bs@ssteaks.com		bstaff	0	
Eric Blatz	Blatz Hats	bblatz@blatz.com		bblatz	0	
Cindy Dokken	Environmental Plastics	cdokken@ep.com		cdokken	0	

1. To make sure the data in the list is current, use the **Refresh** button at the top of the list to capture the latest data from the database.
2. To review a registration, single-click on the name of the individual Requester. This will open the Validate Requester window showing the details of the Requester as shown below.

The 'Validate Requester' window displays the details for 'Cindy Dokken' from 'Environmental Plastics'. The form includes fields for Full Name, Company Name, Primary Phone, Email, and Logon Name. There are checkboxes for 'View Company Issues', 'View Department Issues', and 'View Location Issues'. An unchecked checkbox at the bottom is labeled 'Open Requester Setup Window after Validation'. At the bottom of the window are four buttons: 'Approve', 'Deny(Delete)', 'Deny(Retain)', and 'Cancel'. A 'No Match' button is also visible next to the Company Name field.

3. To approve the Requester registration, click the **Approve** button.
4. To deny the Requester registration and delete the Requester, click the **Deny(Delete)** button.
5. To deny the Requester registration at this time but retain them as a Requester in Help Desk Authority, click the **Deny(Retain)** button.



## Asset Management

Through Asset Management, Help Desk Authority for Web provides an excellent means for keeping an inventory of your organization's Assets. In addition to storing information such as serial numbers, locations, and manufacturers, you can also capture key information about the vendors who have sold or who lease the Assets to you.

If you choose, your inventory procedures can be expanded with HDAsset, ScriptLogic's computer inventory application. It will automatically perform network scans and computer audits of hardware, software, peripherals, components and system information.

If you are an HDAsset user, you can automatically generate comprehensive Asset lists. Assets can always be added manually, but if you have a large number of Assets that you want to track, we recommend that you import them via HDAsset.

## Asset Templates

Entering Asset information can be a tedious task, especially when many Assets can share much of the same information. You can avoid the repetitious chore of entering the same Asset information over and over again by using Asset Templates.

You can define as many Asset Templates as you like. On each template, enter the information repeated from Asset to Asset. Then when adding Asset records, much of the information for the new Asset will already be completed.

**New Asset Template** [Close]

**Asset Template - Edit**

Remote Support

Asset Name: Dell Desktop Computer      Asset Owner: Requester

Asset Type: Desktop Computer      Requester Name: Allan Brentley

Asset Tag:      Company Name: Titan Software, Inc.

Issue History: View All (0)      Go      Location Name:      Department:      ☐ Inactive

**General**    Attachments    Custom Fields

Manufacturer Name: Dell      Vendor Name: Infragistics

Model: Dimension Series      Date of Purchase:      Price: 0

Serial Number:      Part No:      PO Number:      Comments:

[Save] [Cancel]



## Creating an Asset Template

1. Click the **Create New Template** button in the upper right corner of the window. This will open the New Asset Template window.
2. Enter the Asset name in the **Asset Name** field
3. Select the Asset type that you will be creating a template for from the **Asset Type** drop-down menu.
4. Enter the Asset tag information in the **Asset Tag** field if available.
5. The **Issue History** field will be grayed out unless you are editing an Asset template that has been used to create an asset in the past.
6. Select the Asset owner from the **Asset Owner** drop-down menu. The **Requester Name** and **Company Name** drop-down menus below the **Asset Owner** field will be active or inactive depending upon what you have chosen for the Asset Owner.
7. If you have chosen Requester in the **Asset Owner** field, enter the Requester name in the **Requester Name** field. Click on the **Requester Name** link to select a Requester from the Requesters list.
8. If you have chosen Company in the **Asset Owner** field, the **Location Name** and **Department** fields will be available after you enter the name of the Company in the Company Name field. Click on the **Company Name** link to select a Company from the Companies list.
9. Under the General tab, in the bottom section of the window, select the manufacturers name from the **Manufacturer Name** drop-down menu.
10. Select the model from the **Model** drop-down menu.
11. Enter the serial number in the **Serial Number** field.
12. Enter the part number in the **Part No** field.
13. Select the vendor name from the **Vendor Name** drop-down menu.
14. Select the date of purchase from the **Date of Purchase** drop-down calendar.
15. Enter the price in the **Price** field.
16. Enter the purchase order number in the **PO Number** field.
17. Enter any pertinent comments in the **Comments** field.
18. Under the Attachments tab, link any relevant attachments to the template.
19. Under the Custom Fields tab, complete any custom fields that are necessary.
20. Click the **Save** button.

The new Asset Template has now been created and will appear in the Asset Templates list. To create a new Asset from a Template, click the **Create New Asset** button from the Asset window, then select "Create Asset from Template", then select the template.



You can also chose an Asset template from the Asset Templates window and use the selection menu to edit or delete the template, or to create a new Asset from the template.



## Asset Types

Before creating Asset records, you should first decide how your Assets should be categorized. These categories are defined by setting up Asset Types. The categories can be as broad as “Hardware and Software” or as specific as “Laser Printers”, “Inkjet Printers”, “CD Label Printers”, etc. Once Asset Types have been determined, you can create them in Help Desk Authority for Web. If you are unsure of the Asset Types you want to create, you can edit or delete them at a later time.

For HDAAsset users, Asset Types are typically a breakdown of PCs and Servers that you are auditing, such as Desktop, Laptop, Server, etc. Assets in HDAAsset will have an Asset Type of “Audited by HDAAsset”. Likewise, your Asset Types may also incorporate Assets that are not auditable through HDAAsset but are part of your Company inventory, such as phones or handheld devices.

It is important to note that each Asset must be assigned an Asset Type. Therefore, you must create at least one Asset Type. For example, if you choose not to categorize your Assets by type, you can create one category called “Asset” and then assign this type to all Assets that you create.

The screenshot displays the 'HELP DESK AUTHORITY' web application interface. The top navigation bar includes links for Issues, Assets, Reports, Dashboard, KBase, and Queue. A left sidebar menu categorizes functions into Requester Management, Asset Management, Issue Management, Configuration, and Customization. The 'Asset Management' section is expanded, showing 'Asset Types' as the active page. The main content area, titled 'Asset Types', features a 'Create New Asset Type' button and a table listing existing asset types. The table has two columns: 'Options' and 'Asset Type'. The listed types include Computer, Copier, Desktop Computer, Fax Machine, Firewall, Firewall, Computer, Server, Notebook Computer, Phone, Printer, and Router. At the bottom of the table, a pagination control shows '1 - 10 (of 14 total)' and navigation buttons for First, Previous, Next, and Last.

Options	Asset Type
<input type="checkbox"/>	Computer
<input type="checkbox"/>	Copier
<input type="checkbox"/>	Desktop Computer
<input type="checkbox"/>	Fax Machine
<input type="checkbox"/>	Firewall
<input type="checkbox"/>	Firewall, Computer, Server
<input type="checkbox"/>	Notebook Computer
<input type="checkbox"/>	Phone
<input type="checkbox"/>	Printer
<input type="checkbox"/>	Router

1 - 10 (of 14 total)    << First   < Previous   |   Next >   Last >>

To add a new Asset Type:

1. Click the **Create New Asset Type** button. This will open the New Asset Type window shown below.
2. Check the **Inactive** checkbox if you would like to create the Asset Type without making it immediately available.
3. Add any custom fields that you would like to include in the Asset type by clicking the **Add** link in the custom Fields section (see Adding Custom Fields below)

**New Asset Type** Close

**Asset Type**

Asset Type  \* ☐ Inactive

Custom Fields

[Add](#) [Edit](#) [Delete](#)

Column Name	Column Type	Column Label	Default Value	Required	Inactive
COLOR_CODE	Text	Color Code		No	No

1 - 1 (of 1 total) << First < Previous | Next > Last >>

[Change Sequence](#)

[Save](#) [Cancel](#)

## Adding Custom Fields

**New Custom Field** Close

**Custom Field - Asset Type**

Column Name  \*

Column Type  \*

Column Length  \*

Column Label  \*

Default Value

Required ☒ Yes ☐ No

Selection Table ☒

Value
320 MB
500 MB
750 MB
1 TB

Add  
Edit  
Delete

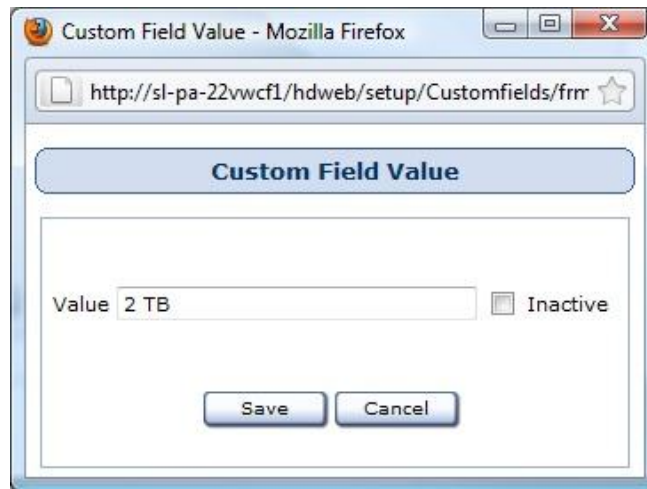
1 - 4 (of 4 total ) << First < Previous | Next > Last >>

☐ Inactive

Save Cancel

- Clicking the **Add** button opens the New Custom Field window. Enter the column name for the field in the **Column Name** field.
- Select the column type from the **Column Type** drop-down menu.
- Enter the column length in the **Column Length** field
- Enter the label for the column in the **Column Label** field.
- Click the **Yes** or **No** radio button depending upon if the field is required or not.
- If the field will be a selection table (drop-down menu), check the **Selection Table** checkbox.

- g. To determine values for the selection table, click the **Add** button. This will open the Custom Field Value window.



Custom Field Value - Mozilla Firefox

http://sl-pa-22vwcf1/hdweb/setup/Customfields/fmr

**Custom Field Value**

Value 2 TB ☐ Inactive

Save Cancel

- h. Enter a selection value in the **Value** field and click the **Save** button.
- i. Repeat the above step for each entry in the selection table.
- j. Click the **Save** button in the New Custom Field window when finished.

## Asset Manufacturers

When tracking and auditing Assets, it is important to know who manufactures them. Help Desk Authority for Web enables you to capture and maintain manufacturer information as well as the model numbers for the items that they supply.

For HDAsset users, the manufacturer of the PC is automatically detected when a workstation is audited and is found in the HDAsset computer details view.

### Searching for an Asset Manufacturer

The top of the Asset Manufacturers window contains the search function to locate manufacturers.

1. To display the entire list of manufacturers, click the **Search** button without entering anything in the **Manufacturer Name** field.
2. To search for a specific manufacturer, enter the name you are searching for in the **Manufacturer Name** field and click the **Search** button.

### Adding a New Asset Manufacturer

Under Asset Management, select **Asset Manufacturers**.

**HELP DESK AUTHORITY** Issues Assets Reports Dashboard KBase Query

**Asset Manufacturers** Create New Manufacturer

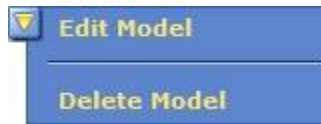
Manufacturer Name  Search Reset

Options	Manufacturer Name
<input type="checkbox"/>	Adobe
<input type="checkbox"/>	Averatec
<input type="checkbox"/>	Best Software, Inc.
<input type="checkbox"/>	Brother
<input type="checkbox"/>	Canon
<input type="checkbox"/>	Casio
<input type="checkbox"/>	Compaq
<input type="checkbox"/>	Corel
<input type="checkbox"/>	Dell
<input type="checkbox"/>	Epson

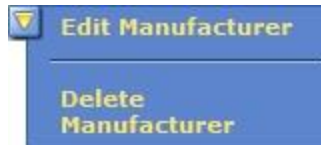
1 - 10 (of 22 total) << First < Previous | Next > Last >>

1. Click the **Create New Manufacturer** button. This will open the Add Asset Manufacturer window.
2. Enter the new manufacturer name in the **Manufacturer** field. This field is required.
3. To add a new model to the Manufacturer, first save the new manufacturer by clicking the **Save** button. Next, click the **Create New Model** button to open the Add Asset Model window.
4. Enter the model name in the **Model** field.
5. Click the **Save** button.

6. In the Options column of the model list, use the selection box to edit or delete a model.



7. Back in the Asset Manufacturers list, use the selection box in the Options column to edit or delete the manufacturer.



## Asset Vendors

Help Desk Authority for Web gives you the capability of assigning Vendors to Assets. In this way, you are able to track and maintain key information pertaining to the Vendors that have sold Assets to you.

For HDAsset users, Vendor information typically pertains to the Vendors that sell or support your computer Assets.

 The screenshot shows the 'Find an Asset Vendor' window. At the top, there's a search bar with 'Vendor Name' and buttons for 'Search', 'Reset', 'Show More Options', and 'Create New Vendor'. Below the search bar is a table with columns: Options, Vendor Name, City, State, Postal Code, Phone Number, and Main Email. The table lists several vendors, including American Office Equipment, Inc., Columbus Office Products, Electronic Warehouse, InfraLogistics, NetAdvantage, Netsoft, Software Wholesellers, and Worldwide Business Equipment, Inc. At the bottom, there's a pagination bar showing '1 - 8 (of 8 total)' and navigation links.
 

Options	Vendor Name	City	State	Postal Code	Phone Number	Main Email
	American Office Equipment, Inc.	Birmingham	AL	35201	205-673-7856	sales@aocel.com
	Columbus Office Products	Columbus	OH	43085	614-373-2702	sales@cop.com
	Electronic Warehouse	San Jose	CA	95101	408-678-5645	sales@electronicwarehouse.com
	InfraLogistics					
	NetAdvantage					
	Netsoft					
	Software Wholesellers	Gary	IN	46401	219-864-3116	sales@softwarewholesellers.com
	Worldwide Business Equipment, Inc.	Gainesville	FL	32601	386-829-0575	sales@wbei.com

## Searching for an Asset Vendor

The top of the Asset Vendors window contains the search function to locate vendors.

1. To display the entire list of vendors, click the Search button without entering anything in the **Vendor Name** field.
2. To search for a specific vendor, enter the name you are searching for in the **Vendor Name** field and click the **Search** button.
3. To narrow your search, click the **Show More Options** drop-down menu. This will expand the search area of the window, and allow you to search by name, email, city or state, phone number and postal code.



## Adding a New Asset Vendor

1. Click the **Create New Vendor** button at the top of the window. This will open the New Asset Vendor window as shown below.

**New Asset Vendor** [Close]

**Asset Vendor**

Vendor Name: Buzard Software Sales \*

Address 1: 13 Leda Dr.

Address 2:

City: Irvine

State: CA

Postal Code: 90229

Phone Number: 320-798-8245

Fax Number: 320-887-7812

Web URL: www.buzardsoft.com

Main Email: db@buzardsoft.com

☐ Inactive

Comments:

[Save] [Cancel]

2. Enter the vendor name in the **Vendor Name** field.
3. Enter the address in the **Address 1** and **Address 2** fields if necessary.
4. Enter the city in the **City** field
5. Enter the state in the **State** field
6. Enter the postal code in the **Postal Code** field
7. Enter the phone number in the **Phone Number** field
8. Enter the fax number in the **Fax Number** field
9. Enter the website address in the **Web URL** field.
10. Enter the email address in the **Main Email** field.
11. Enter any comments in the **Comments** text area.
12. Check the **Inactive** box if this Vendor will be created but not activated at this time.
13. Click the **Save** button. The Vendor will now appear in the vendors list.



## Issue Management

Issues are items that are tracked from inception to closure. Issues track information on reported incidents including:

- Who reported the Issue
- To whom the Issue was assigned
- The Issue Category, Priority, and Status
- The Assets involved
- The actions taken toward the Issue's resolution
- Time spent and associated costs

Accurate Issue records will help you to optimize resolution time, better manage your workloads and facilitate communication with your customers.

Help Desk Authority's Issue Management enables you to:

- Link related Issues with dependencies (Assets, Vendors, Manufacturers, Requesters, etc.) promoting easy and logical workflow.
- Route Issues to personnel based on Group, Status and expertise using the Skills Based Assignment feature.
- Apply your organization's hours of operation to accurately age and manage Issues.
- Link Issues to Products you support and Contracts you service.

## Issue Templates

In Help Desk Authority for Web you can define Issue Templates for Issues that occur frequently and contain common data. You can then retrieve the template when entering Issues with similar information. The repetitive data will be automatically duplicated each time the Issue Template is used.

When defining an Issue Template, the following Issue fields can be duplicated:

- Priority
- Category
- Issue Type
- Assigned Group
- Assigned User
- Summary
- Description
- Resolution

After your Issue Template has been defined, you can instruct Help Desk Authority to automatically create Issues using the template according to a schedule that you define. This is done via Help Desk Authority's Recurring Issue feature.

Recurring Issues allow you to define an Issue that will recur at a specified time interval. The most common applications of this feature involve routine maintenance tasks that would be performed on a daily, weekly, or monthly basis. For example, the Information Systems department may define a Recurring Issue to backup databases on a weekly basis.

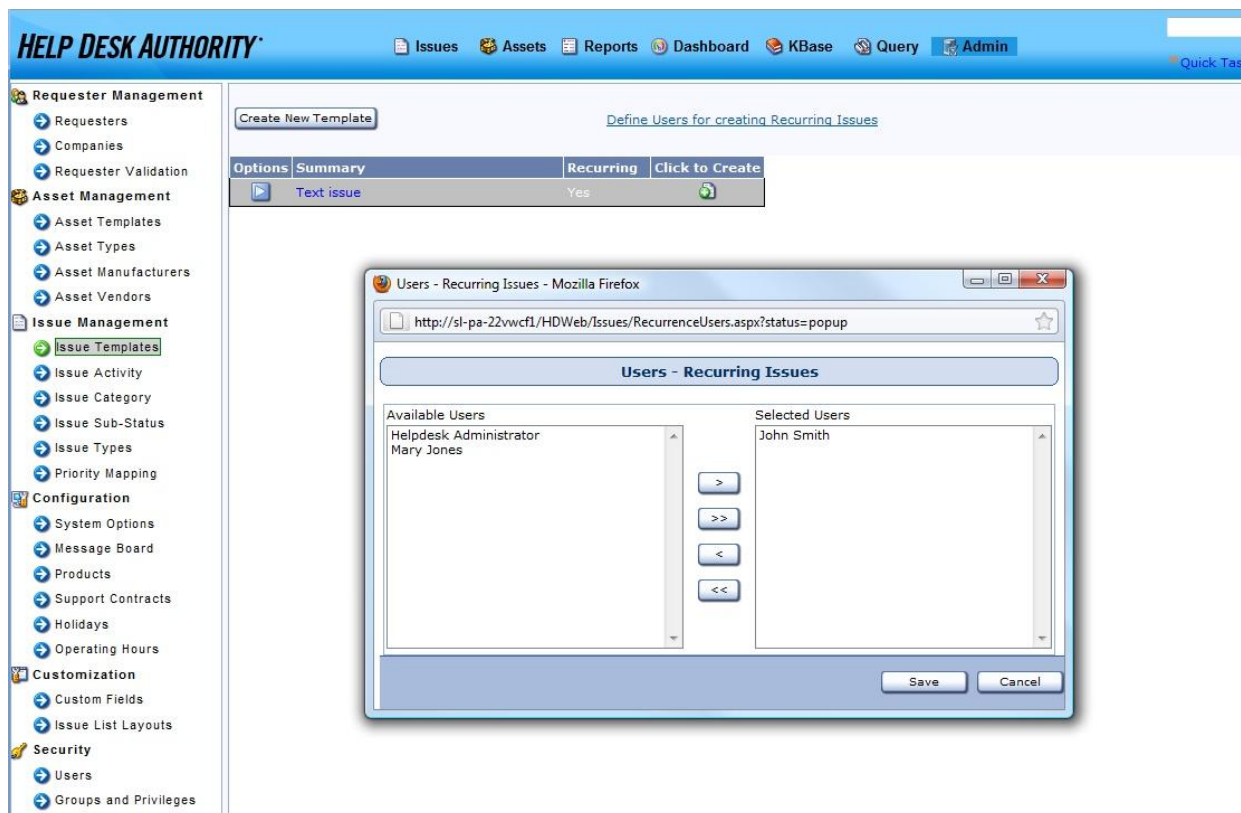
A Recurring Issue is an Issue Template that runs on a user-defined schedule. This schedule tells Help Desk Authority when and how often to create an Issue using the Issue Template to populate the Issue fields.

## Defining Users for Creating Recurring Issues

Help Desk Authority for Web has the ability to create templates for Issues that recur automatically (explained later in this section). These issues can be automatically generated and assigned to certain individual Users. When a User is defined to receive a recurring Issue, the issues, if any are scheduled, will be created when that specific User logs into Help Desk Authority.

To define Users for creating recurring Issues:

1. Select **Issue Templates** from the navigation pane. This will open the Issue Templates window.
2. Click the “**Define Users for creating Recurring Issues**” link at the top of the window next to the **Create New Template** button. This will open the Users – Recurring Issues window.



3. Using the arrow buttons, move Users from the Available Users pane to the Selected Users pane. These will be the Users who, upon login, trigger the creation of recurring Issues assigned to them.
4. Click the **OK** button.

## Creating an Issue Template

1. Click the **Create New Template** button in the upper left corner. This will open the Add Issue Template window as shown below.

The screenshot shows the 'Add Issue Template' window. It features a title bar with 'Add Issue Template' and a 'Close' button. Below the title bar is a tabbed interface with four tabs: 'General', 'Description', 'Resolution', and 'Recurrence'. The 'General' tab is active. It contains several dropdown menus: 'Requester', 'Company', 'Issue Type', 'Priority', 'Impact', 'Urgency', 'Category', 'Sub-Category 1', 'Sub-Category 2', 'Assigned Group', and 'Assigned To'. There is also a checkbox labeled 'Dependent on Parent' and a link 'Related Templates'. At the bottom of the 'General' tab is a large text area labeled 'Summary'. At the bottom of the window are 'Save' and 'Cancel' buttons.

2. There are four tabs in the Issue Template – Add window:
  - **General** – Contains basic information most likely to be repeated in recurring Issues.
  - **Description** – A large text field for the description of the Issue.
  - **Resolution** – A large text field for resolution notes.
  - **Recurrence** – Enables the generation of an Issue based on a recurring schedule.
3. Complete the fields in the first three tabs with the information that will be repeated for new Issues using this template.
4. In the Recurrence tab, check the check box labeled “**Generate Issue based on a recurring schedule**” if this will be a regular and recurring Issue.

**Edit Issue Template** Close

**Issue Template**

**General** **Description** **Resolution** **Recurrence**

☒ Generate issue based on a recurring schedule

☐ Automatically generate Issue ☒ Prompt me before generating Issue

☒ Daily  
☐ Weekly  
☐ Monthly  
☐ Yearly

☒ Every 1 day(s)  
☐ Every weekday

Range of Recurrence

Start: 11/10/2010

☒ End after 10 occurrences  
☐ End by

Days in advance to enter: 0

Save Cancel

5. If you wish Help Desk Authority to create the Issue automatically, check the radio button labeled “**Automatically generate Issue**”, otherwise, check the radio button labeled “**Prompt me before generating Issue**”.
6. In the Recurrence Pattern section, click the corresponding radio button for **Daily**, **Weekly**, **Monthly** or **Yearly**.
7. If you select **Daily**, enter the number of days between recurrences, or check the **Every weekday** radio button.
8. If you select **Weekly**, enter the number of weeks between recurrences, then select the days on which the occurrence takes place.
9. If you select **Monthly**, you have the option of selecting the date that the occurrence will take place each month, or you can select the first, second, third, fourth or last day (or specific day) of each month (or every x number of months) if the exact date will change.
10. If you select **Yearly**, you can specify a single date for the occurrence to take place each year, or you can select the first, second, third, fourth or last day (or specific) day of a specific month if the exact date will change.
11. You can also set a date range for your recurring Issue in the Range of Recurrence section. First, select a start date, then select either the number of total occurrences or an end date.
12. In the **Days in Advance to enter** field, enter the number of days in which you would like to be notified before the scheduled Issue occurs. For example, if you enter a “2” in this field and you have a recurring Issue that is due to be opened on August 6<sup>th</sup>, when you login to Help Desk Authority on August 4<sup>th</sup>, you will be notified that an Issue is due to be open on August 6<sup>th</sup>.

13. In the example below, the recurring Issue is automatically generated and occurs every two weeks on Monday and Saturday, beginning on 8/10/2010 and ending on 7/10/2011.

The screenshot shows the 'Edit Issue Template' dialog box with the 'Recurrence' tab selected. The 'Generate issue based on a recurring schedule' checkbox is checked. Under this, 'Prompt me before generating Issue' is selected with a radio button. The frequency is set to 'Weekly' with a radio button, and 'Recur every 2 week(s) on'. The days of the week are listed with checkboxes: Sunday, Monday (checked), Tuesday, Wednesday, Thursday, Friday, and Saturday (checked). The 'Range of Recurrence' section shows 'Start' as 8/10/2010 and 'End by' as 7/10/2011, with 'End after 0 occurrences' also visible. At the bottom right, 'Days in advance to enter' is set to 0. 'Save' and 'Cancel' buttons are at the bottom center.

**Edit Issue Template** Close

**Issue Template**

**General** **Description** **Resolution** **Recurrence**

☒ Generate issue based on a recurring schedule

☐ Automatically generate Issue ☒ Prompt me before generating Issue

☐ Daily ☒ Weekly ☐ Monthly ☐ Yearly

Recur every 2 week(s) on

☐ Sunday ☒ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday  
☐ Friday ☒ Saturday

Range of Recurrence

Start 8/10/2010

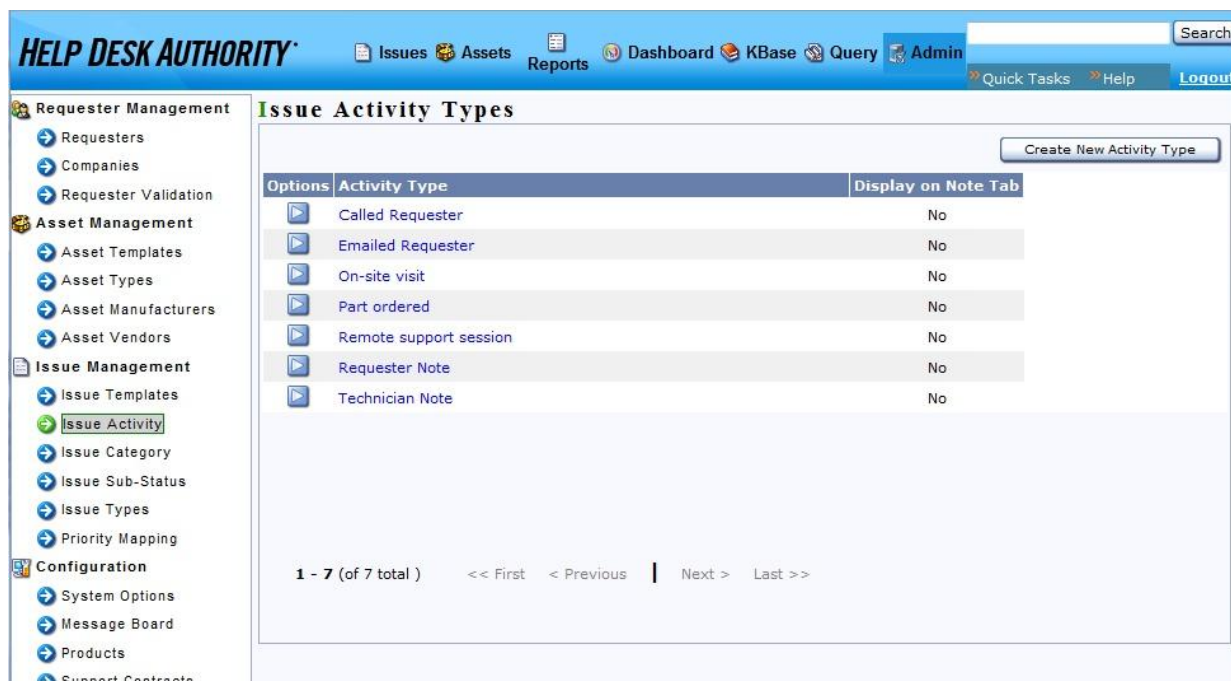
☐ End after 0 occurrences ☒ End by 7/10/2011

Days in advance to enter 0

14. Click the **Save** button.
15. If you would like to edit or even delete an Issue Template at any time, use the **Edit** and **Delete** buttons in the Issue Templates window

## Issue Activities

Issue Activities are the various steps taken to address and resolve Issues. By creating common Activity Types to use in Issue management, you can quickly update an Issue with a previously defined Activity.



### Creating an Issue Activity Type

1. Click the **Create New Activity Type** button in the upper right corner of the window. This will open the Add Issue Activity window.

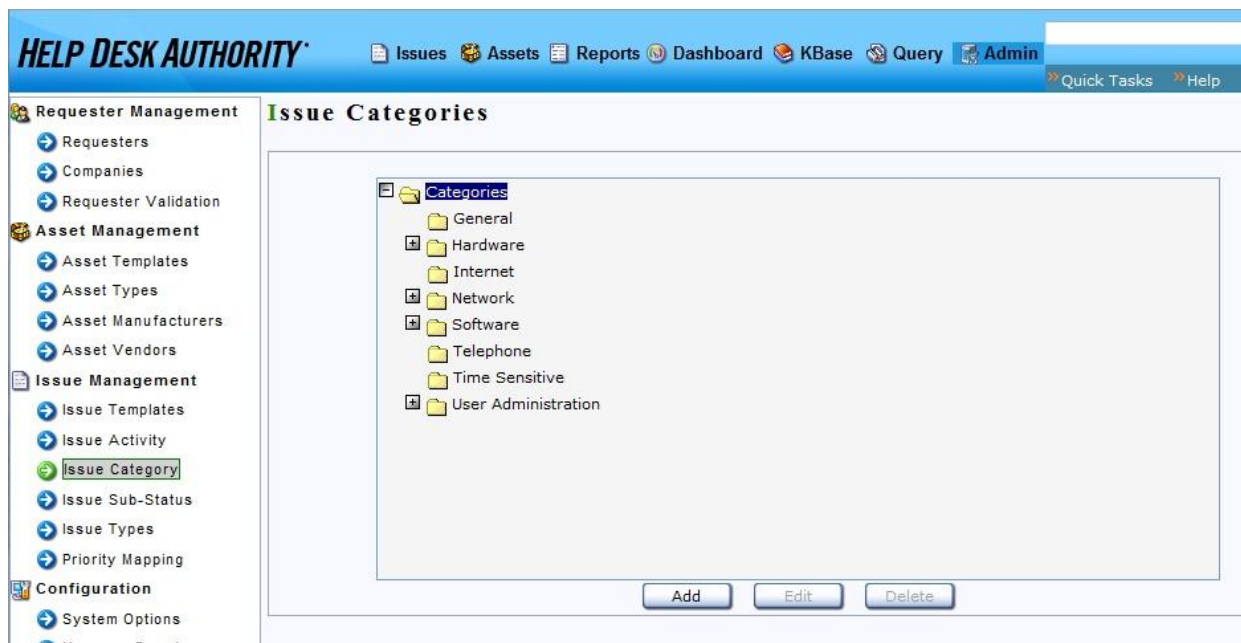
The 'Add Issue Activity' dialog box is shown. It has a title bar with 'Add Issue Activity' and a 'Close' button. The main content area is titled 'Issue Activity Type'. It contains a text field for 'Activity Type' with the value 'Requester Follow-up'. Below this are three radio buttons: 'No Cost' (selected), 'Cost Per Incident', and 'Cost Per Time Spent'. To the right of the last two radio buttons are input fields. Below these is a label 'cost per...'. Further down are four input fields labeled 'Days', 'Hours', 'Minutes', and a dropdown menu labeled 'Round Charge for Actual Time Spent'. At the bottom left, there are two checkboxes: 'Prevent editing once this Activity is added to an Issue' (unchecked) and 'Display on Note Tab' (checked). To the right of these checkboxes is a label 'Inactive'. At the bottom center are 'Save' and 'Cancel' buttons.



2. In the **Activity Type** field, enter a descriptive name for the new Activity Type. This field is required.
3. A cost must be defined for your new Activity Type. You have three choices:
4. **No Cost** – Check this radio button if there will be no cost associated with the Activity Type.
5. **Cost Per Incident** – Check this radio button if there will be one fixed cost per occurrence of this Activity Type. Enter this cost in the text field provided.
6. **Cost Per Time Spent** – Check this radio button if the cost associated with this Activity Type will be based upon the time spent performing the Activity. Enter a cost in the text field provided, then specify that cost by entering a number in the **Days**, **Hours** or **Minutes** text fields. For example, if you will be basing the cost on a rate of \$25/hour, enter “25” in the **Cost Per Time Spent** field, then enter “1” in the **Hours** field.
7. You can also round the charge for actual time spent with the drop-down menu to the right of the **Cost Per Time Spent** fields.
8. Once this Activity Type is used in an Issue, making changes to it will potentially create confusion. To avoid this, check the check box labeled “**Prevent editing once this Activity is added to an Issue**”.
9. Check the “**Display on Note Tab**” checkbox if you would like the activity to be entered as a note also.
10. Click the **Save** button.
11. The new Activity Type will now appear in the Activity Type list.
12. If you would like to edit or even delete an Asset Template at any time, use the **Edit** and **Delete** buttons in the Activity Type window.

## Issue Categories

An Issue Category defines the general nature of an Issue. In addition to defining categories, you also have the option of creating sub-categories where you may drill down as many levels as you like. For example, you may define a Category of “Software Bug”. Under the “Software Bug” Category, you may want to define sub-categories of application names.



## Creating an Issue Category

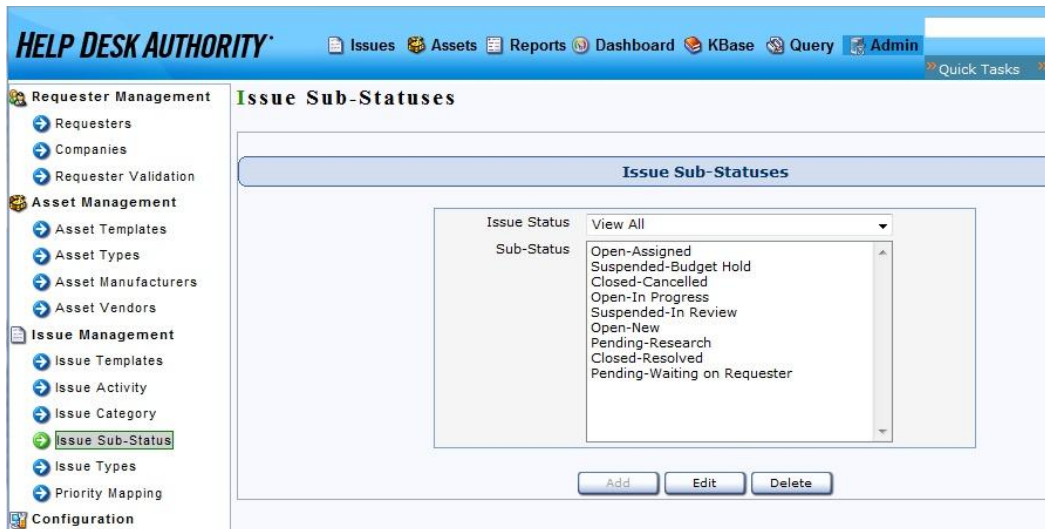


The screenshot shows a window titled "Add Issue Category" with a "Close" button in the top right corner. Below the title bar is a section labeled "Issue Category". Inside this section, there is a text field labeled "Category Name" containing the word "Private". To the right of the text field is a red asterisk icon. Below the text field is a checkbox labeled "Inactive". At the bottom of the dialog are two buttons: "Save" and "Cancel".

1. Select a category in the list that will be the parent category for the new category. If you are creating a parent category instead, select the main **Categories** category in the list.
2. Click the **Add** button. This will open the Add Issue Category Type window.
3. Enter the name of your new Issue Category in the **Category Name** field.
4. Click the **Save** button.
5. The new Issue Category will now appear in the Issue Category list.
6. If you would like to edit or delete an Issue Category at any time, use the **Edit** and **Delete** buttons in the Issue Category window.



## Issue Sub-Statuses



By default, Help Desk Authority for Web is installed with four pre-defined Issue Statuses:

- Open
- Closed
- Pending
- Suspended

In the **Issue Status** drop-down menu, select one of the above Issue Statuses to view the Sub-Statuses below them. To edit a Sub-Status, select it and click the **Edit** button. This will open the Edit Issue Sub-Status window as shown below.



These Issue Statuses cannot be changed, but you are able to create Sub-Statuses under each of these Issue Statuses. You can name them anything you like to fit the operations of your help desk. Below are some examples:

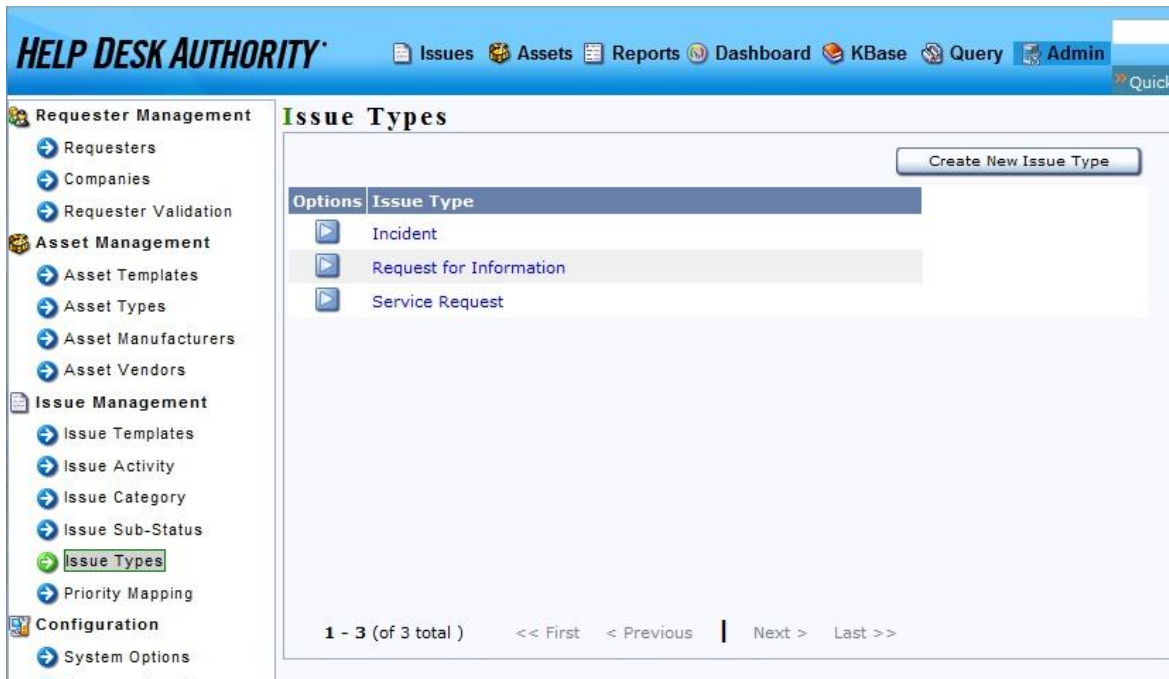
Status	Possible Sub-Statuses
Open	<ul style="list-style-type: none"><li>• Research</li><li>• Assigned</li><li>• Call Back</li></ul>
Pending	<ul style="list-style-type: none"><li>• Pending User Approval</li><li>• Waiting on customer</li><li>• Pending QA Action</li></ul>

### *Creating an Issue Sub-Status*

1. In the **Issue Status** drop-down menu, choose the Issue Status under which your new Sub-Status will fall.
2. Click the **Add** button. This will open the Add Issue Sub-Status window.
3. Enter the name of your new Issue Sub-Status in the **Sub-Status** field.
4. Click the **Save** button.

The screenshot shows a web-based window titled "Add Issue Sub-Status" with a "Close" button in the top right corner. The window contains a section labeled "Issue Sub-Status". Inside this section is a form with two main fields: "Issue Status" and "Sub-Status". The "Issue Status" field is a dropdown menu currently set to "Closed". The "Sub-Status" field is a text input box containing the text "Issue Resolved". To the right of the "Sub-Status" input box is a red asterisk (\*). Below the "Sub-Status" field is an "Inactive" checkbox, which is currently unchecked. At the bottom of the window are two buttons: "Save" and "Cancel".

## Issue Types



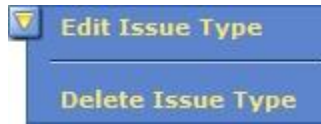
Issue Types let your help desk create a basis for the most common types of Issues that occur in your business.

### Creating an Issue Type



1. Click the **Create New Issue Type** button in the upper right corner of the window. This will open the Add Issue Type window.
2. Enter the name of your new Issue Type in the **Issue Type** field.
3. Click the **Save** button.

4. In the Options column of the Issue Type list, you can use the selection box to edit or delete the Issue type.



## Priority Mapping

Priority mapping is a feature that allows users to define levels of priority—based on impact and urgency—for every phase of the Issue lifecycle. Priorities are automatically categorized on a scale from highest to lowest. The scale is graphically represented on a color-coded grid marked with Urgencies and Impacts.

**HELP DESK AUTHORITY** | Issues | Assets | Reports | Dashboard | KBase | Query | Admin | Search | Quick Tasks | Help | Logout

**Requester Management**

- Requesters
- Companies
- Requester Validation

**Asset Management**

- Asset Templates
- Asset Types
- Asset Manufacturers
- Asset Vendors

**Issue Management**

- Issue Templates
- Issue Activity
- Issue Category
- Issue Sub-Status
- Issue Types
- Priority Mapping**

**Configuration**

- System Options
- Message Board
- Products
- Support Contracts
- Holidays
- Operating Hours

**Customization**

- Custom Fields
- List Layouts

**Security**

- Users
- Groups and Privileges

### Priority Mapping

Impacts

Name
Affects Business
Affects Group of Users
Affects User

Urgencies

Name
High
Medium
Low


Priorities

Name
Urgent
High
Medium
Low





☒ Automatically assign priorities based on impact and urgency  
☐ Allow users to manually override priority settings

	Affects Business	Affects Group of Users	Affects User
High	Urgent	Urgent	High
Medium	Urgent	High	Medium
Low	High	Medium	Low


## Adding an Impact

1. In the **Impacts** text field, enter the name of the new Impact, then click the  button.
2. The Impact will now be visible in the Name column of the Impact list.







3. You can delete the Impact by selecting it, then clicking the  button. When prompted for confirmation, click the **OK** button.
4. To edit the Impact, select it, then click the  button, or simply double-click the name of the Impact.
5. To change the order of your Impacts, select one and use the  or  keys to arrange them.


## Adding an Urgency

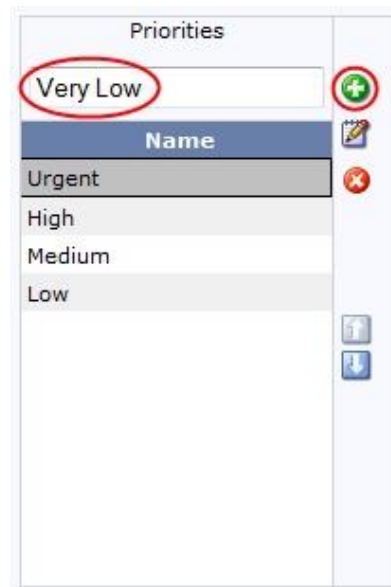
1. In the **Urgencies** text field, enter the name of the new Urgency, then click the  button.
2. The Urgency will now be visible in the Name column of the Urgency list.





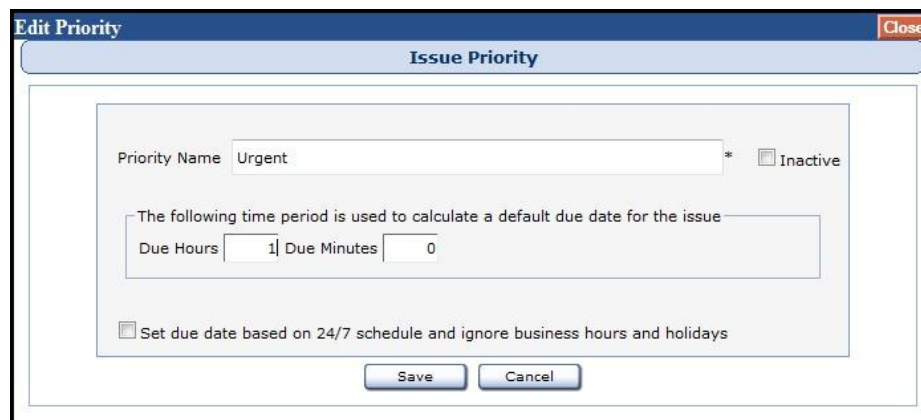
3. You can delete the Urgency by selecting it, then clicking the  button. When prompted for confirmation, click the **OK** button.
4. To edit the Urgency, select it, then click the  button, or simply double-click the name of the Urgency.
5. To change the order of your Urgencies, select one and use the  or  keys to arrange them.



### *Adding a Priority*

1. In the **Priorities** text field, enter the name of the new Priority, then click the  button.
2. The Priority will now be visible in the Name column of the Priority list.



3. You can delete the Priority by selecting it, then clicking the  button. When prompted for confirmation, click the **OK** button.
4. To edit the Priority, select it, then click the  button, or simply double-click the name of the Priority. Editing a Priority is different from editing an Impact or Urgency. In a Priority, not only can you edit the name, but the default due date can also be edited as shown below.





- To change the order of your Priorities, select one and use the  or  keys to arrange them.

### Adjusting the Mapping Grid

To adjust Priorities up or down in the Priority Mapping grid:

- Check the “**Automatically assign Priorities based on Impact and Urgency**” checkbox. This allows for adjustments to the Priority Mapping grid. Also, if you would like to allow the user to override the Priority settings, check the checkbox labeled “**Allow users to manually override Priority settings**”.



☒ Automatically assign priorities based on impact and urgency  
☐ Allow users to manually override priority settings


- Select the Priority you wish to shift up or down in importance.
- Using the  and  buttons below the Priority Map, expand the selected Priority level to the appropriate Impact and Urgency levels.

#### Example:

In the screen shot below, the Priority “High”, which intersects the “Medium” Urgency and the “Affects Group of Users” Impact, is selected.

	Affects Business	Affects Group of Users	Affects User
High	Urgent	Urgent	High
Medium	Urgent	High	Medium
Low	High	Medium	Low

Clicking the  button after selecting the above priority will change the Priority Levels of several Impacts and Urgencies by expanding the “High” Priority level to the left.

	Affects Business	Affects Group of Users	Affects User
High	Urgent	High	High
Medium	High	High	Medium
Low	High	Medium	Low



Note also that this shifts the “Urgent” Priority to the left, resulting in a lower Priority for some Urgency/Impact combinations.

## Configuration

New in Help Desk Authority for Web 9.0 is the Configuration window. We’ve taken many elements of the application that are configurable and put them into one handy window with for easy navigation. The items in the Configuration window are as follows:

- **System Options** – Includes the most common settings for the application such as time settings and management, license information, directory settings, email set-up, field tracking and Issue reporting.
- **Message Board** – Create and manage Message board messages.
- **Products** – Manage Products.
- **Support Contracts** – Create and manage support contracts.
- **Holidays** – Set and manage holidays.
- **Operating Hours** – Set and manage the operating hours of the help desk.

## System Options



There are six different tabs in the System Options window. They are:

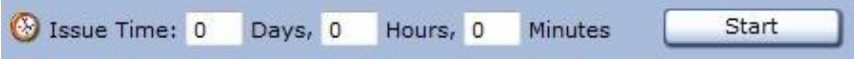


- **General** – General settings such as Issue time spent, Issue status change options, set-up options for HDAccess and Remote Management, and Time/Date format.
- **License** – Licensing information for the application including Requester and Company name, as well as the current license key in use.
- **Directories** – Settings for the individual directory folders for Attachments, Search index and Reports.
- **Email Configuration** – Sets the default settings for email related to Issues including set-up of an SMTP or Outlook server.
- **Report Settings** – Configures the Report Viewer settings and Issue ticket settings.
- **Field Tracking** – Settings for generating Issue activity records to track changes in select fields.



## The General Tab

The General tab contains some of the more general settings in Help Desk Authority.

The first section of the General tab is “Time spent for an Issue will be determined by these options”. You have three options:

Option	Meaning
Issue Time Entered	<p>Issue time is a field in the Issue window. It represents the total time spent on an Issue. This option can be used in lieu of Activity time. The Issue timer with this option will appear like this:</p> 
Total Activity Time (sum of all Activities entered)	<p>As Activities are entered, each one will have a time assigned to it by the user. Using this option totals the time entered for all Activities. The Issue timer with this option will appear like this:</p> 
Sum of Issue Time and Activity Time	<p>This option will use the sum of both Issue time entered and total Activity time. The Issue timer with this option will look like this:</p> 

The next section of the General tab is a list of checkboxes, all of which are covered below:

Option	Result
<b>Start the Issue timer automatically when creating a new Issue</b>	Starts the Issue timer whenever a new Issue is opened.
<b>When the Status of an Issue changes and the Issue no longer has the Status of "Closed", reset the Resolved By and Resolved Date fields to blank</b>	If an Issue Status is changed from "Closed", the <b>Resolved By</b> and <b>Resolved Date</b> fields are no longer valid because the Issue is not considered closed. This option resets those fields when the Status changes from "Closed".
<b>When the Status of an Issue changes to "Closed", Resolution must be entered</b>	Checking this box makes the <b>Resolution</b> field a required field when an Issue status is "Closed".
<b>Use Business Hours and Holidays when calculating the age of an Issue</b>	Selecting this option will include only normal business hours and holidays as defined by the user when determining the age of an Issue.
<b>Filter Requesters on Issue windows based on selected Company</b>	This option will display Requesters in the Issue window Grouped by the selected Company.
<b>Enable Remote Support on Port:</b>	Enables Desktop Authority Remote Management on the port entered.
<b>Enable Active Directory Single Sign-on (does not include HDAccess)</b>	Enables Active Directory Single Sign-on, but does not include HDAccess.
<b>Enable Active Directory Single Sign-on for HDAccess</b>	Enables Active Directory Single Sign for HDAccess.

The next section in the General tab is HDAccess.

In the **HDAccess URL** field, enter the URL for your HDAccess home page.

In the last section of the General tab, you can choose a format for timestamps.

1. Select a User name format in the **User Name Format** drop-down menu.
2. Select a date/time format in the **Date/Time Format** drop-down menu.

## The License Tab

This tab holds the Requester, Company and license information for Help Desk Authority.

Requester: 30 Day

Company: Evaluation License

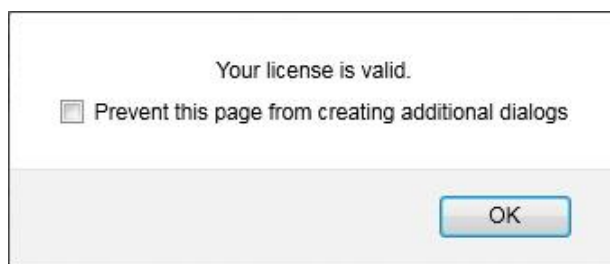
License Key: B1F4053A-VER80-EVL1-BAC1-BAE2-BRV1-CID10-CIR4-AXD1-USR10-SRH1-ISU500-TMP30-SPS2010123

☒ Unlock to Edit

Import License

1. Make sure the **"Unlock to Edit"** checkbox is checked if you wish to edit the fields.
2. Enter the Requester name in the **Requester** field.

3. Enter the Company name in the **Company** field.
4. Enter the license key in the **License Key** field.
5. To Import a license key, click the **Browse** button and browse to the correct .ini file containing your license key data. Once you have selected the correct file, click the **Import** button.
6. To validate your license key, click the **Validate** button. If your key is valid, you will receive the following pop-up message.



7. Click the **OK** button.
8. To reset all fields, click the **Reset** button.

### *The Directories Tab*

The Directories tab is used for setting the directories for Attachments, Search Index and Reports.

Attachments	C:\Program Files\ScriptLogic Corporation\Help Desk Authority\HDAuthority\Attach
HDSearch Index	C:\Program Files\ScriptLogic Corporation\Help Desk Authority\HDAuthority\Index
Reports	C:\ReportsDir

[Verify Directories](#)

Each of the three fields will be automatically populated with the correct paths of the folders you have previously selected in the Windows version of Help Desk Authority. If they are still blank, go to **Administration > Configuration > System Options** in the Windows version of Help Desk Authority and select the correct folders. The next time you open this window in Help Desk Authority for Web, these fields will be populated.

## The Email Configuration Tab

The Email Settings tab contains the fields for configuring your email with Help Desk Authority for Web.

The screenshot shows the 'System Options' dialog box with the 'Email Configuration' tab selected. The dialog has a title bar with 'System Options' and a 'Close' button. Below the title bar is a tabbed interface with tabs for 'General', 'License', 'Directories', 'Email Configuration' (selected), 'Report Settings', and 'Field Tracking'. The 'Email Configuration' tab contains two sections: 'SMTP Options' and 'Miscellaneous Options'. The 'SMTP Options' section includes fields for 'SMTP Server Name', 'Port Number', 'Email Address', and 'Email Display Name'. There is a checkbox for 'Use SSL (Default port for sSMTP is 465)' and a checkbox for 'My Server Requires Authentication'. If the latter is checked, there are fields for 'SMTP User Name' and 'Password', and a 'Change' button. Below these are two more checkboxes: 'Route outgoing emails through HDMail' and 'Allow HDMail to add Cc Addresses as subscribers when processing incoming emails'. The 'Miscellaneous Options' section includes a 'Default Email Template' dropdown menu set to '<Default>' and a checkbox for 'Skip attachments while forwarding an issue by email'. At the bottom right of the dialog are 'Save' and 'Cancel' buttons.

1. Enter the SMTP Server Name in the **SMTP Server Name** field. This is required.
2. Enter the port number in the **Port Number** field. This is also required.
3. Check the **"Use SSL (Default sSMTP port is 465)"** checkbox if you wish to use SSL.
4. Enter the email address in the **Email Address** field. This field is required.
5. Enter an email display name in the **Email Display Name** field if desired.
6. If your email server requires authentication, check the **"My Server Requires Authentication"** checkbox, and then enter the user name and password in the appropriate fields.
7. If you would like to route your outgoing email through HDMail, check the **"Route Outgoing Email Through HDMail"** checkbox.
8. If you checked the checkbox in Step 7 above, you also have the option to **"Allow HDMail to Add Cc Addresses as Subscribers When Processing Incoming Emails"** by checking the second checkbox.
9. In the **Default Email Template** drop-down menu, select a template you would like to use as the default for your outgoing mail.

10. If you would like to forward your Issues by email without using attachments, check the “**Skip Attachments while forwarding an Issue by email**” checkbox.

### *The Report Settings Tab*

In this tab you will configure how reports will be viewed.

The screenshot shows the 'System Options' dialog box with the 'Report Settings' tab selected. The 'Report Viewer Settings' section has a 'Report Viewer' dropdown menu set to 'Html Viewer'. The 'Issue Ticket' section contains a list box labeled 'Default Issue Report' with an 'Add' button next to it. To the right of the list box are 'Add', 'Edit', and 'Delete' buttons. Further right are 'Browse...' and 'Upload' buttons. Below these are 'Name:' and 'File Name:' text boxes. At the bottom right of the 'Issue Ticket' section is a checkbox labeled 'Report available for viewing from the Issue Window' with 'Apply' and 'Cancel' buttons below it. The 'Save' and 'Cancel' buttons are at the bottom right of the dialog box.

1. In the Report Viewer Settings section, select either Html Viewer or ActiveX viewer from the **Report Viewer** drop-down menu depending on which viewer you would like to use for viewing reports.
2. In the Issue Ticket section, the box on the left displays the reports that will be viewed in the Issue ticket. You can add more reports to this list by clicking the **Add** button. This enables the **Browse...** and **Upload** buttons on the right.
3. Click the **Browse...** button to locate the report file (.rpt extension) you would like to add.
4. Enter the Issue ticket name in the **Name** field *before clicking the Upload button*.
5. Click the **Upload** button once you have selected the report to add. The report will be added to the list.
6. Check the “**Report available for viewing from the Issue Window**” checkbox if you would like this report to be available for viewing from the Issue window.
7. Click the **Apply** button when all reports have been added.

## The Field Tracking Tab





Field tracking is used to generate Activities within an Issue based upon changing values in a particular field. For every field selected for tracking, a separate Activity will be created each time that field changes value.

For example, in the Selected Fields list below (in the right pane), there are twelve fields selected for tracking. If each one of these fields had a change in value within an Issue, twelve new Activities would be created within that Issue.

The screenshot shows the 'System Options' dialog box with the 'Field Tracking' tab selected. The dialog has a title bar with 'System Options' and a 'Close' button. Below the title bar is a tabbed interface with tabs for 'General', 'License', 'Directories', 'Email Configuration', 'Report Settings', and 'Field Tracking'. The 'Field Tracking' tab is active, displaying the following text: 'When Issue fields change, you can generate Issue Activity records to track those changes. Select the fields that you want to track from the list below.'

There are two list boxes: 'Available Fields' on the left and 'Selected Fields' on the right. The 'Available Fields' list contains: Asset, Contract, Department, Due Date, Location, Phone, Priority, Product Build, Product Name, Product Version, Received Date, Resolution, Resolved By, and Resolved Date. The 'Selected Fields' list contains: Assigned Group, Assigned User, Category, Company\*, Requester, Description, Impact, Issue Type, Status, Sub-Status, Summary, and Urgency. Between the two lists are four buttons: '>', '>>', '<', and '<<'. A note at the bottom states: 'Note: Fields denoted with an asterisk '\*' cannot be removed because they are being used by a HDAutoEscalate Rule'. At the bottom right are 'Save' and 'Cancel' buttons.

To move fields from the Available pane to the Selected pane:

1. Select a field from the **Available Fields** list.
2. Click the  button to move the selected field to the **Selected Fields** list.
3. To move a selected field back to the **Available Fields** list, select the field and click the  button.
4. To move *all* fields from one list to the other with one click, use the  and  buttons.

## The Message Board

In the Message Board window, you can add, edit, delete and set the sequence of messages that will appear in the Help Desk Authority Message Board, located in the Top Pane of the Dashboard. You can edit the Message Board to display any important messages that all Help Desk Authority Users and HDAccess customers should see. A good example would be a bulletin to notify Users of a scheduled system downtime. Multiple Headlines can be displayed, and the display sequence can also be controlled.

The screenshot shows the 'HELP DESK AUTHORITY' web application interface. The top navigation bar includes links for Issues, Assets, Reports, Dashboard, KBase, Query, and Admin. A search bar is located on the right. The left sidebar contains a tree view of the application's functionality, including Requester Management, Asset Management, Issue Management, Configuration, Customization, and Security. The 'Message Board' option under Configuration is highlighted. The main content area is titled 'Manage Message Board' and features a 'Set Sequence' button and a 'Create New Message' button. A table displays the current sequence of messages, with columns for Options, Title, View Option, Start Date/Time, and End Date/Time. The table lists six messages, with 'HDSync Tool' and 'HDSearch' being the last two. Below the table, a pagination bar shows '1 - 6 (of 6 total)' and navigation buttons for First, Previous, Next, and Last.

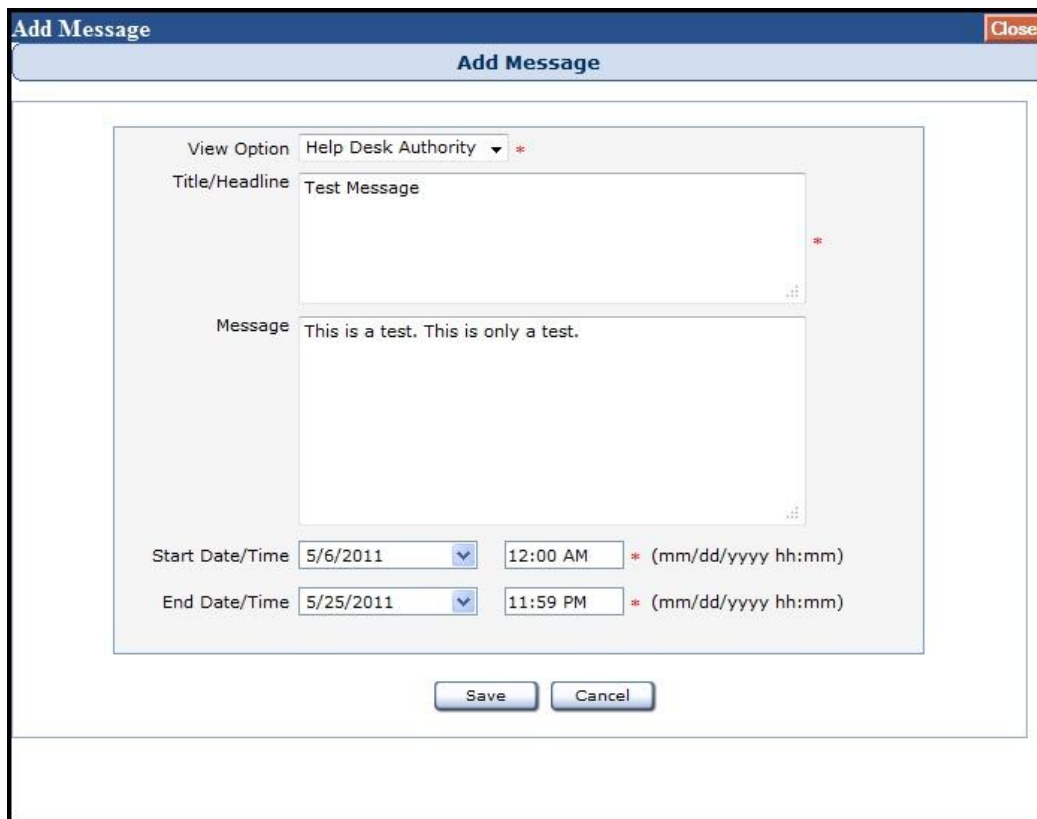
Options	Title	View Option	Start Date/Time	End Date/Time
	Help Desk Authority for Windows & Web	Both	1/1/2010	12/1/2012
	HDAccess	Both	1/1/2010	12/1/2012
	HDMail	HDAuthority	1/1/2010	12/1/2012
	HDAutoEscalate	HDAuthority	1/1/2010	12/1/2012
	HDSync Tool	HDAuthority	1/1/2010	12/1/2012
	HDSearch	HDAccess	1/1/2010	12/1/2012

The buttons to the left of the Message Board can be used to stop or start the automatic scrolling of the Message Board messages (center button), or to view the previous message (left button) or the next message (right button) in the sequence.



## Creating Headlines and Messages in the Message Board

1. Click the **Create New Message** button to the right of the headline list. This will open the Add Message window.



2. In the **View Option** drop-down menu, select Help Desk Authority, HDAccess or Both, depending upon which Users you would like to see the message.
3. In the **Title/Headline** text field, enter a unique title for the message. Note that this will also be the headline that is displayed in the Message board. This is a required field.
4. In the **Message** text field, enter the details of the message.
5. In the **Start Date/Time** and **End Date/Time** drop-down menus, select the start and end dates of the message to set the duration. These fields are required.
6. Click the **Save** button when finished.



Although the message has been created and saved, it must still be activated and set in sequence before it will appear in the rotation of messages in the Message Board. Be sure to continue with the following steps to complete the process.

7. Click the **Set Sequence** button in the Message Board window. The Set Sequence window will be displayed as shown in Step 8.



8. Select the Help Desk Authority tab if the message is to be displayed in Help Desk Authority.

Head Line	Start Date/Time	Title
<input checked="" type="checkbox"/>	1/1/2010 12:00 AM	Help Desk Authority for Windows & Web
<input checked="" type="checkbox"/>	1/1/2010 12:00 AM	HDAccess
<input checked="" type="checkbox"/>	1/1/2010 12:00 AM	HDMail
<input checked="" type="checkbox"/>	1/1/2010 12:00 AM	HDAutoEscalate
<input checked="" type="checkbox"/>	1/1/2010 12:00 AM	HDSync Tool

☐ Display in Ascending Date Order      ☐ Display in descending date order

\* Use shift + Up / Down arrow keys to change sequence using keyboard

9. Check the checkbox in the **Head Line** column to activate the message.
10. If there are multiple messages in the window, select the new message by clicking anywhere in the row, then use the up and down arrow buttons to the right of the message list to set the sequence. Note that the messages can be set to display in ascending or descending order by simply checking the appropriate checkbox located under the message list.
11. If the message is to be displayed in HDAccess, select the HDAccess tab and repeat Steps 9 and 10.
12. When finished, click the **Save** button to save the sequence.
13. To edit an existing message, select **Edit Message** from the selection box as shown below. This will open the Edit Message. Click the **Save** button when finished.
14. To delete a message, select **Delete Message**.

▼ Edit Message

Delete Message

## Products

After defining Products in Help Desk Authority, they can then be linked to Companies that purchase them or to individual Requesters who you service independently from a Company. Products can also be linked to Issues when your Requesters call into your help desk.

The Products window contains a search function to search for Products, a Product list, and the ability to add, edit or delete Products.

Options	Product Name	Manufacturer
<input type="checkbox"/>	X-Track CS	X-Track Software Corporation
<input type="checkbox"/>	X-Track Financial	X-Track Software Corporation
<input type="checkbox"/>	X-Track HR	X-Track Software Corporation
<input type="checkbox"/>	X-Track Purchasing	X-Track Software Corporation
<input type="checkbox"/>	X-Track QA	X-Track Software Corporation
<input type="checkbox"/>	X-Track Sales	X-Track Software Corporation

## Searching Products

To search for a product, do one of the following:

1. Enter the name of the Product you are searching for in the **Product Name** field, or enter the name of the Manufacturer in the **Manufacturer** field. To narrow your search, you can enter a value in both of these fields.
2. Click the **Search** button.

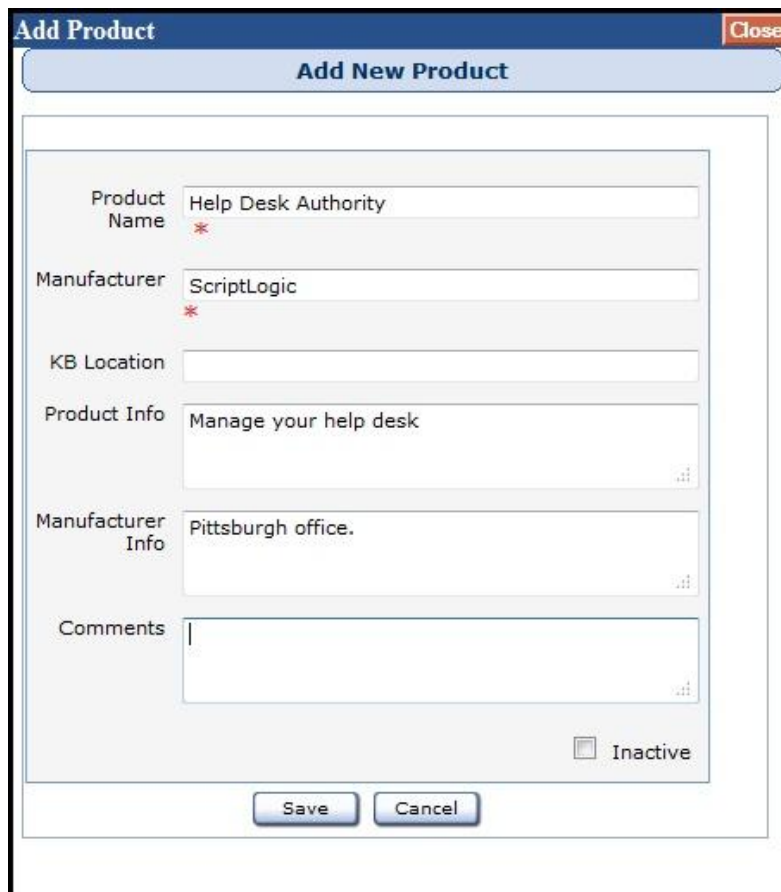
OR

1. Without entering data into the **Product Name** or **Manufacturer** fields, simply click the **Search** button. This will present the entire Product list.

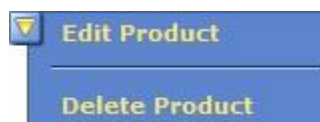
## Adding, Editing and Deleting a Product

To add a Product:

1. Click the **Create New Product** button. This will open the Add Product window.
2. Enter the name of the Product in the **Product Name** field. This field is required.
3. Enter the Manufacturer name in the **Manufacturer** field. This field is required.
4. In the **KB Location** field, enter the URL of the Knowledge Base article for this Product if one exists.
5. Under **Product Info**, enter any pertinent information regarding the Product.
6. Under **Manufacturer Info**, enter any pertinent information regarding the Manufacturer.
7. Enter any necessary comments in the **Comment** field.
8. Click the **Save** button when you are finished creating the Product.



9. To edit a product in the product list, select **Edit Product** from the selection box next to the product name (shown below). This will open the Edit Product window. Make the necessary edits, then click the **Save** button.
10. To delete a product, select **Delete Product** from the selection box (shown below).



## Support Contracts

In Help Desk Authority for Web, Support Contracts are the service agreement terms that you set up with your customers for supporting the Products or services that you sell to them.

After defining your Support Contracts in Help Desk Authority, they can then be linked to Companies that purchase your Products and services or to individual customers who you service independently from a Company. Support Contracts can also be linked to Issues when your customers call into your Help Desk.

You can choose from Support Contracts based on:

- Duration – Usually an annual agreement.
- Service minutes – Contract is based upon hours/minutes used.
- Support Issues – Contract is based upon a set number of Issues.

In the Support Contracts window, you can search for a Support Contract. You can also add, edit and delete Support Contracts.

The screenshot displays the 'HELP DESK AUTHORITY' web application interface. The top navigation bar includes links for Issues, Assets, Reports, Dashboard, KBase, Query, and Admin. A left sidebar menu lists various management categories: Requester Management, Asset Management, Issue Management, Configuration, Customization, and Security. The 'Support Contracts' section is highlighted in the Configuration menu. The main content area, titled 'Support Contracts', features a 'Create New Support Contract' button and a search field labeled 'Contract Name' with 'Search' and 'Reset' buttons. Below the search field is a table listing existing contracts:

Options	Contract Name	Contract Type
	1 Year Contract	Contract Duration
	100 Hours Contract	Service Minutes
	100 Issues Contract	Support Issues

At the bottom of the table, it shows '1 - 3 (of 3 total)' and navigation links: '<< First', '< Previous', 'Next >', and 'Last >>'.

### Searching Support Contracts

1. Enter the name of the Support Contract you are searching for in the **Contract Name** field.
2. Click the **Search** button.

OR

1. Click the **Search** button without entering text into the **Contract Name** field to see the entire list of Support Contracts.

## Adding, Editing and Deleting a Support Contract

To add a new Support Contract:

1. Click the **Create New Support Contract** button. This will open the Add Contract window.

**Add Contract** [Close]

**Add New Contract**

Contract Name: 50 Hours contract \*

Standard Cost: 750    Warning %: 20    ☐ Warranty

Comments: [Text Area]

**Contract Type\***

☐ Contract based on number of issues  
Default number of support issues: 0

☐ Support Contract Duration  
# of Years: 0    # of Months: 0    # of Days: 0

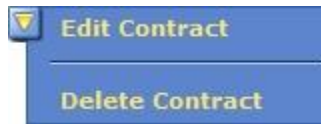
☒ Contract Service Minutes  
Service Time: Hours: 50    Minutes: 0

☐ Inactive

[Save] [Cancel]

2. Enter the name of the new Contract in the **Contract Name** field. This field is required.
3. In the **Standard Cost** field, enter the cost per (Contract, incident, hour, etc.).
4. In the **Warning %** field, enter a value from 1 to 100. When the Support Contract has been used down to this specified percentage, the user will receive a notification that the Contract may soon expire.
5. If this is a warranty Contract, check the **Warranty** checkbox. The **Standard Cost** field can be left blank.
6. In the Contract Type section, check the radio button next to the corresponding Contract type.
7. If the contract is to be based upon a set number of Issues, enter the number of Issues in the **"Default Number of Support Issues"** text field.
8. If the Contract is to be based upon duration of time, enter the number of months, days and years in the text fields provided.
9. If the Contract is to be based upon a pre-determined amount of support time, enter the hours and minutes in the fields provided.
10. Click the **Save** button when finished. The new Contract will now appear in the Contract list.
11. To edit a Support contract in the Support Contract list, select **Edit Contract** from the selection box next to the Contract name (shown below). This will open the Edit Contract window. Make the necessary edits, then click the **Save** button.

12. To delete a Support Contract, select **Delete Contract** from the selection box (shown below).



## Holidays

Holidays are those days that are generally not included when tabulating time in a Contract. (Note that this can be adjusted.) Help Desk Authority allows you to configure your own set of holidays.

The Holidays window will present a list of all the holidays that have been defined. Checking the **Show Past Holidays** checkbox will add holidays that have already past to the list.



Note that Help Desk Authority does not come with any pre-defined holidays. Each holiday recognized by your organization must be added individually.

**HELP DESK AUTHORITY**

IssuesAssetsReportsDashboardKBaseQueries

Requester Management

- Requesters
- Companies
- Requester Validation

Asset Management

- Asset Templates
- Asset Types
- Asset Manufacturers
- Asset Vendors

Issue Management

- Issue Templates
- Issue Activity
- Issue Category
- Issue Sub-Status
- Issue Types
- Priority Mapping

Configuration

- System Options
- Message Board
- Products
- Support Contracts
- Holidays**
- Operating Hours

Customization

- Custom Fields
- List Layouts

Security

- Users
- Groups and Privileges

### Holidays List

☐ Show Past Holidays

Create New Holiday

Options	Holiday Name	Start Date	End Date
	Memorial Day 2011	5/30/2011	5/3/2011
	Independence Day 2011	7/4/2011	7/4/2011
	Labor Day 2011	9/5/2011	9/5/2011
	Veterans' Day 2011	11/11/2011	11/11/2011
	Thanksgiving 2011	11/24/2011	11/24/2011
	Christmas 2011	12/25/2011	12/26/2011
	New Year's Day 2012	1/1/2012	1/2/2012
	MLK Jr. Day 2012	1/16/2012	1/16/2012
	Presidents' Day 2012	2/20/2012	2/20/2012
	Memorial Day 2012	5/28/2012	5/28/2012

1 - 10 (of 24 total )<< First < Previous | Next > Last >>



## Adding, Editing and Deleting Holidays

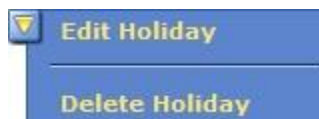
To add a Holiday:

1. Click the **Create New Holiday** button. This will open the Holiday – Add window.
2. Enter the start date in the **Start Date** field and the end date in the **End Date** field. These dates will usually be the same date. When you click the drop-down button, you will be presented with a calendar. Simply navigate to the day you would like to use for the holiday and click on it. The date will be populated in the field. You can also type the date into the field.
3. Enter a name for the holiday in the **Holiday Name** field.
4. Click the **Save** button when finished. The new holiday will now appear in the list.



When writing a description for your holiday, it is a good idea to include the year. This will enable you to set up multiple instances of the same holiday from year to year.

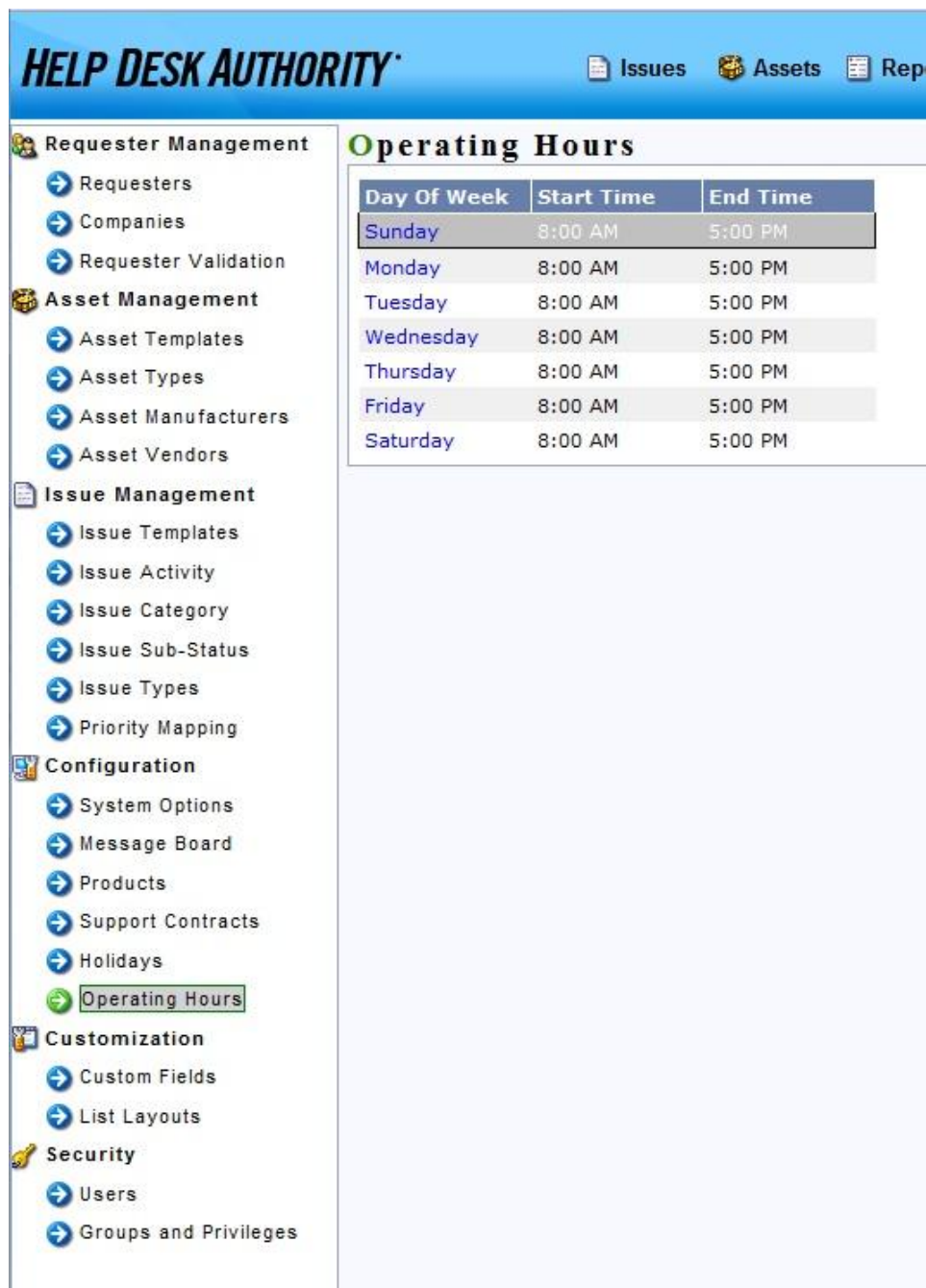
5. To edit a holiday, select **Edit Holiday** from the selection box (shown below). This will open the Edit holiday window. Make the necessary edits, then click the **Save** button.
6. To delete a holiday, select **Delete Holiday** from the selection box (shown below).



## Operating Hours

Help Desk Authority for Web allows individual help desks to set their own hours of operation. These hours will be taken into account when determining the age of Issues, where you have the option of excluding non-working hours from the age calculation.

The Operating Hours window will present a list of days of the week, along with start times and end times. The list comes pre-populated with all seven days of the week. You will be able to adjust the times by following the instructions below.



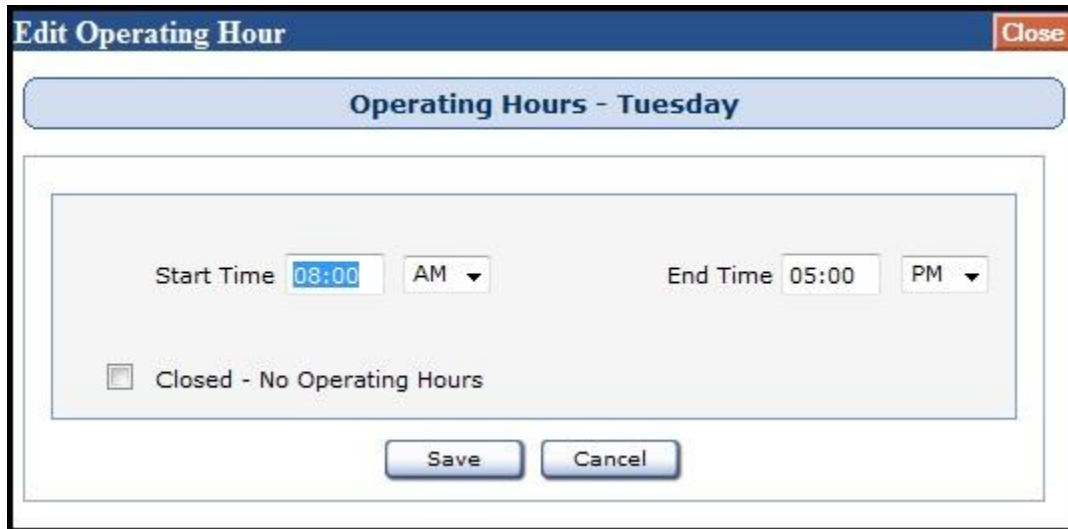
The screenshot displays the 'HELP DESK AUTHORITY' web application interface. The top navigation bar includes links for 'Issues', 'Assets', and 'Reports'. A left-hand sidebar contains a tree view of the application's modules, including Requester Management, Asset Management, Issue Management, Configuration, Customization, and Security. The 'Operating Hours' option under the Configuration module is highlighted. The main content area is titled 'Operating Hours' and features a table with columns for 'Day Of Week', 'Start Time', and 'End Time'. The table is pre-populated with data for all seven days of the week, each with a start time of 8:00 AM and an end time of 5:00 PM.

Day Of Week	Start Time	End Time
Sunday	8:00 AM	5:00 PM
Monday	8:00 AM	5:00 PM
Tuesday	8:00 AM	5:00 PM
Wednesday	8:00 AM	5:00 PM
Thursday	8:00 AM	5:00 PM
Friday	8:00 AM	5:00 PM
Saturday	8:00 AM	5:00 PM



## Editing Operating Hours

To edit Operating Hours:



The screenshot shows a dialog box titled "Edit Operating Hour" with a "Close" button in the top right corner. Below the title bar is a header "Operating Hours - Tuesday". The main content area contains two time fields: "Start Time" set to "08:00" with an "AM" dropdown, and "End Time" set to "05:00" with a "PM" dropdown. Below these fields is a checkbox labeled "Closed - No Operating Hours" which is currently unchecked. At the bottom of the dialog are "Save" and "Cancel" buttons.

1. Click on the day of the week you would like to edit. This will open the Edit Operating Hours window.
2. Check or un-check the “**Closed – No Operating Hours**” checkbox. If checked, the **Start Time** and **End Time** fields will be disabled. If un-checked, you will be able to set the hours of each day to match those of your help desk.
3. Enter a start time and an end time in the **Start Time** and **End Time** fields.
4. Click the **Save** button when finished.

## Customization

Every organization is different and has its own unique requirements. We have designed Help Desk Authority for Web to meet the anticipated needs of the user community. Help Desk Authority has provided a means to capture the information typical to most help desk/customer service environments. However, you also have the capability of creating your own fields to capture any type of data that you like. This capability is provided via customization, found under the **Customization** section of the Administration window.

There are two types of customizations available:

- Custom fields
- Customize Windows Layouts

The screenshot shows the 'HELP DESK AUTHORITY' web application interface. The top navigation bar includes links for Issues, Assets, Reports, Dashboard, KBase, Query, and Admin. A search bar and links for Quick Tasks, Help, and Logout are also present. The left sidebar lists various modules: Requester Management, Asset Management, Issue Management, Configuration, Customization, and Security. The 'Custom Fields' link under the Customization section is highlighted. The main content area is titled 'Custom Fields' and features a dropdown menu for 'Custom Fields For'. Below this, a message states: 'Please choose a Module from the drop-down menu above, in order to manage the Custom Fields for that Module.' A table with the following columns is displayed: Options, Column Name, Column Type, Column Label, Default Value, Required, and Inactive. A 'Create New Custom Field' button is located to the right of the table. A 'Change Sequence' button is positioned below the table.

## Custom Fields

Help Desk Authority allows you to create custom fields for Assets, Companies, Requesters and Issues.

### *Creating, Editing and Deleting Custom Fields*

To create a custom field:

1. In the **Custom Fields For** drop-down menu, select Assets, Companies, Requesters or Issues.
2. Click the **Create New Custom Field** button to open the Add Custom Field window.

The screenshot shows the 'Add Custom Field' window with a title bar that includes a 'Close' button. The window has a sub-header 'Custom Field - Assets'. The form contains the following fields and controls:

- Column Name**: A text input field with a red asterisk indicating it is required.
- Column Type**: A dropdown menu currently set to 'Text' with a red asterisk.
- Column Length**: A text input field with a red asterisk.
- Column Label**: A text input field with a red asterisk.
- Default Value**: A text input field.
- Required**: Two radio buttons, 'Yes' and 'No'. The 'No' button is selected.
- Selection Table**: A checkbox that is currently unchecked.
- Value**: A table with one header row labeled 'Value'. To the right of the table are three buttons: 'Add', 'Edit', and 'Delete'.
- Inactive**: A checkbox at the bottom right of the form area.
- Save** and **Cancel**: Two buttons at the bottom center of the window.

3. Enter a column name in the **Column Name** field. This will be the name of a new column for the custom field within the database. This is a required field.
4. From the **Column Type** drop-down menu, select the type of data for the new field. This field is required.
5. Enter a numeric amount for the column length in the **Column Length** field. This field is required.
6. Enter the column label in the **Column Label** field. This label will appear with the custom field. This field is required.
7. There are two radio buttons for determining the requirement of the field. If you wish the field to be required, select the **Yes** radio button. Otherwise, select the **No** radio button.
8. In the **Selection List Values** section, you can add, edit or delete values if the custom field will be a drop-down menu. To add values:

- a. Check the **Selection Table** checkbox.
  - b. Click the **Add** button. This will open the Custom Field Value window.
  - c. Enter the value for the selection in the **Value** field.
  - d. Click the **Save** button.
  - e. Repeat steps b-d for each additional value.
9. In the **Default Value** field, enter a default value that will be displayed, if any, in the field. If the field will be a direct entry field, enter the value. If the field will be a drop-down menu, select the default value from the **Default Value** drop-down menu.
10. When the custom field has been created, click the **OK** button. The custom field will now be displayed in the custom fields list under the appropriate “Custom Fields For” category.
11. To edit a custom field, double-click the field you wish to edit, or select the field and click the **Edit** button. This will open the custom field – Edit window. Make the edits and click the **Save** button. Note that you cannot edit the **Column Name**, **Column Type**, or **Column Length** fields because these are actually changes taking place in the database. You can change the **Column Label**, **Default Value** and **Selection List Value** fields.
12. To delete a custom field, select the custom field and click the **Delete** button.

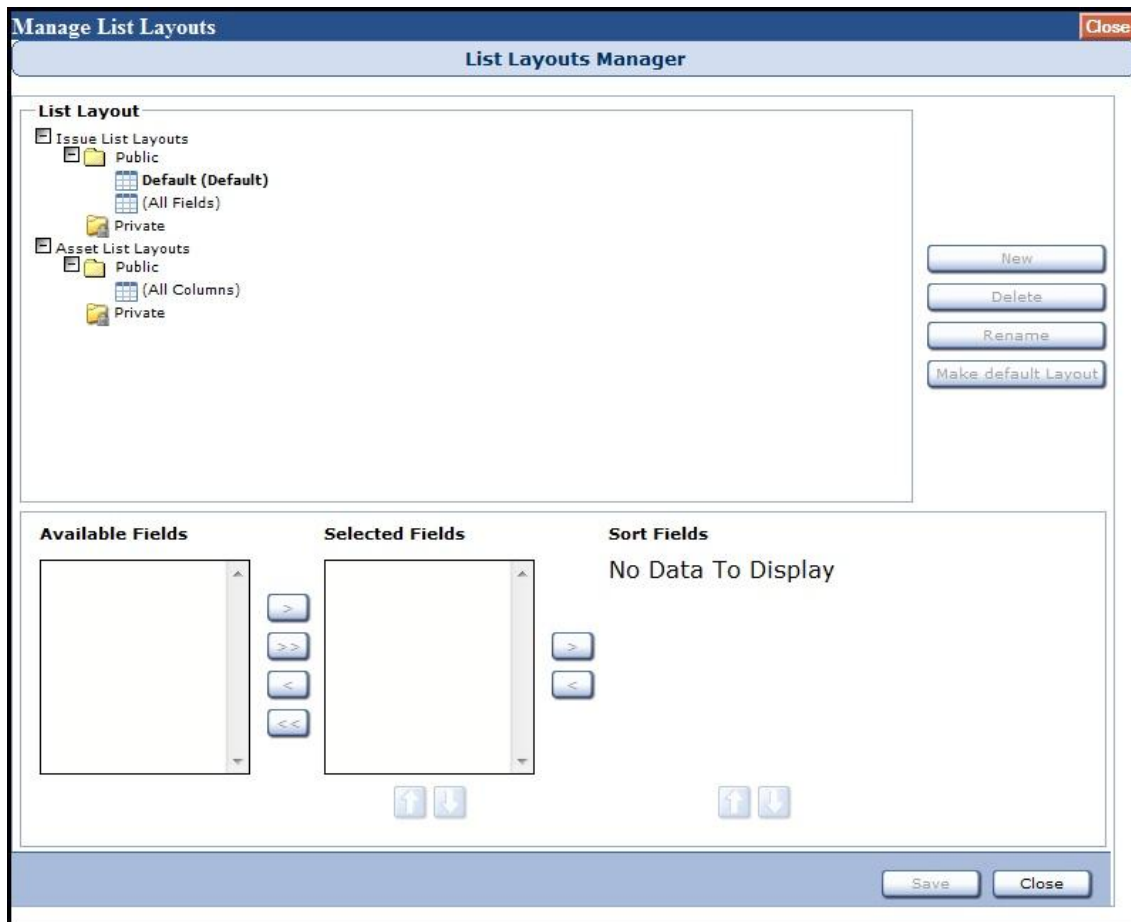
## List Layouts

Issue and Asset Lists are used frequently throughout Help Desk Authority. They provide a quick, organized method for viewing groups of Issues and Assets.




Help Desk Authority generates a list when you are:


- Viewing the contents of an Issue or Asset folder.
- Viewing the results of a Query.
- Using the Search drop-down menu on the toolbar.
- Viewing Issue History via the Issue, Asset, Requester, and Company windows.







Regardless of how you are viewing a list, you can always select the specific information that you want to see. This is accomplished via list layouts.



To create a new list layout:

1. Select the folder (Issue list or Asset list, Public or Private) where you would like to store the new list layout.
2. Click the **New** button. This will create a new list layout to be named.
3. Enter a name for the new layout in the space provided.
4. Select the fields to be used in the list from the **Available Fields** menu. Select a field to be added and click the  button to move it to the **Selected Fields** menu. If you wish to move all available fields to the **Selected Fields** list, use the  button. If you change your mind about a field, you can move it back to the Available Fields list with the  button. To

start fresh, you can also move all selected fields back to the Available Fields list with the  button.

5. Once the desired fields for your new layout are in the Selected Fields list, you will have the ability to arrange them in any order you like. To move a field in the order, simply select the field and use the  and  buttons to move a field up or down in the order.
6. Once your selected fields are in the preferred order, you will have the ability to order the data in each field by using the **Sort Fields** list. Select the fields upon which you would like to sort the data, then move them to the **Sort Fields** list using the  button. You can always move them back using the  button.
7. Select “Ascending” or “Descending” from the **Sort Direction** drop-down menu.
8. The fields can be prioritized in the **Sort Fields** list with the  and  buttons. For example, in the list below, the Issues will be sorted first on Received Date (Ascending), then Issue Number (Ascending) and finally Summary (Descending).

#### Sort Fields

Field Name	Sort Direction
Created User	Ascending
Company	Ascending
Category	Ascending



9. To delete a layout, select the layout from the List Layout tree and click the **Delete** button.
10. To rename a layout, select the layout from the List Layout tree and click the **Rename** button.
11. To make a layout the Default layout, select the layout from the List Layout tree and click the **Make default Layout** button.
12. When you have finished creating list layouts, click the **Save** button.

## Security

Help Desk Authority's security is structured around Groups. A Group is a collection of users who are assigned specific security permissions. Groups are named in a manner that describes the Group, such as "Technical Support" or "Help Desk".

After establishing Help Desk Authority Users in the database, they can be assigned to a Group. Each Security Group is then given access to specified Help Desk Authority functions. These functions are called Privileges. For example, viewing an Issue list, defining custom fields, deleting Issues, and attaching files are Privileges that can be assigned to a Security Group. Users may be assigned to more than one Security Group.

## Users

The screenshot displays the 'HELP DESK AUTHORITY' web application interface. The top navigation bar includes links for Issues, Assets, Reports, Dashboard, KBase, Query, and Admin. A search bar is located in the top right corner. The left sidebar contains a tree view of the application's functionality, including Requester Management, Asset Management, Issue Management, Configuration, Customization, and Security. The main content area is titled 'Find a User' and features a search form with a 'User Name' field, 'Search', 'Reset', and 'Show More Options' buttons. Below the search form is a table listing users. The table has columns for 'Options', 'Full Name', 'Primary Email', 'Primary Phone', and 'Logon Name'. The table contains three rows: 'Helpdesk Administrator' (Logon Name: Admin), 'John Smith' (Logon Name: jsmith), and 'Mary Jones' (Logon Name: mjones). At the bottom of the table, there is a pagination control showing '1 - 3 (of 3 total)' and navigation buttons for 'First', 'Previous', 'Next', and 'Last'.

Options	Full Name	Primary Email	Primary Phone	Logon Name
	Helpdesk Administrator			Admin
	John Smith			jsmith
	Mary Jones			mjones

In the Users window, a list of the users will be presented. You can also perform a search to find specific users by using the steps below.

### *To Find a Specific User or Group of Users:*

Enter search criteria in at least one of the fields outlined in Steps 1-3.



The screenshot shows a web interface titled "Find a User". At the top, there is a note: "Note: Enter full or partial search criteria and click Search button." To the right of the note are two buttons: "Create New User" and "Edit User Options". Below the note, there are three search fields: "Full Name", "Primary Email", and "Logon Name". Each field has a corresponding input box. To the right of the "Logon Name" field are two buttons: "Search" and "Reset".

1. Enter the name (or partial name) of the user you are searching for in the **Full Name** field.
2. Enter the logon name (or partial logon name) of the user you are searching for in the **Logon Name** field.
3. Enter the primary email (or partial primary email) of the user you are searching for in the **Primary Email** field.
4. Click the **Search** button.



## To Add a User

1. Click the **Create New User** button. This will open the Add User window.

Add User

Close

User Setup - Add

Full Name

\*

Primary Phone

Primary Email

Secondary Phone

Alt Notify Email

Mobile Number

IM Address

Fax Number

IM System

Inactive

☐

Login

Groups and Privileges

Comment

Skill

Logon Name

admin

Password

.....

Reset Password

☐ Allow Windows Login

☐ Allow Web Login

☐ Allow Help Desk Authority for Web Lite Login

☐ Active Directory User

☐ Account Locked

☐ User must change Password

☐ Disable Single Signon

Last Logon Date

Save

Cancel

2. Enter the full name of the new user in the **Full Name** field. This is the only required field when creating a new user.
3. Enter the primary email address of the new user in the **Primary Email** field.
4. If the user has an alternative email address, enter it in the **Alt Notify Email** field.
5. If the user can be contacted through an instant messaging (IM) service, enter the user's instant messaging address (name) in the **IM Address** field, then enter the name of the IM service in the **IM System** field (i.e. Skype, Yahoo!IM, AIM, etc.)
6. Enter the primary phone number in the **Primary Phone** field.
7. Enter the secondary phone number, if available, in the **Secondary Phone** field.

8. Enter the user's mobile number in the **Mobile Number** field.
9. Enter the user's fax number in the **Fax Number** field.

Below the basic user information fields, there are four tabs in the User Setup – Add window.



## The Login Tab













The Login tab contains the necessary login credentials and permissions of the user.

1. Enter the logon name in the **Logon Name** field.
2. Enter the password in the **Password** field.
3. Check the **Allow Windows Login** checkbox if the user will be allowed to login to Help desk Authority for Windows.
4. Check the **Allow Web Login** checkbox if the user will be allowed to login to Help Desk Authority for Web.
5. Check the **Active Directory User** checkbox if the user will be a member of the Active Directory.
6. If the account is to be locked, check the **Account Locked** checkbox.
7. If you would like the user to change his or her password upon first login, check the **User must change Password** checkbox.
8. Check the **Disable Single Signon** checkbox to disable single signon for the user.
9. Complete all the necessary information in the four tabs (explained below) of the User Setup – Add window.
10. Click the **Save** button. The new user will now appear in the User list.

## The Groups and Privileges Tab

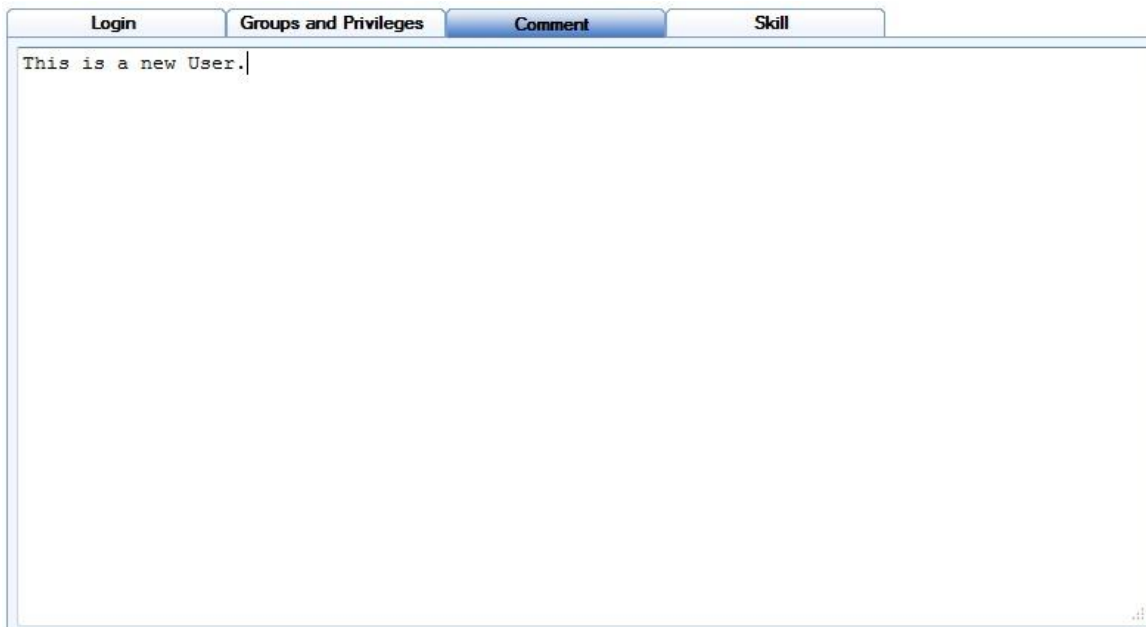
The Groups and Privileges tab contains Group and privilege information of the new user.

The screenshot shows a web-based user management interface with four tabs: Login, Groups and Privileges (selected), Comment, and Skill. The main content area is divided into two sections. The top section, titled 'Available Groups' on the left and 'Is a member of these Groups' on the right, contains a list of groups: '([Everyone])', 'Admin', and 'Help Desk'. Between the lists are four buttons: '>', '>>', '<', and '<<'. The bottom section, titled 'Available Privileges' on the left and 'Guaranteed Privileges' on the right, contains a list of privileges: 'Asset.Add', 'Asset.Delete', 'Asset.Edit', 'Asset.Search', 'AssetManufacturer.Add', 'AssetManufacturer.Delete', 'AssetManufacturer.Edit', 'AssetManufacturer.Search', 'AssetTemplate.Add', 'AssetTemplate.CreateAsset', 'AssetTemplate.Delete', 'AssetTemplate.Edit', 'AssetTemplate.Search', 'AssetTypes.Add', and 'AssetTypes.Delete'. Between the lists are four buttons: '>', '>>', '<', and '<<'. Below the 'Guaranteed Privileges' list is another section titled 'Revoked Privileges' with an empty list and the same four buttons.

1. To assign the new user to a Group, select the Group name in the **Available Groups** list on the left and click the  button. The Group will now be visible in the **Is a member of these Groups** list on the right. You can add more than one Group to the list.
2. To remove an assigned Group from the user, highlight the Group on the right and click the  button. The Group will be moved to the left and will no longer be associated with the user.
3. To assign the new User to *all* available Groups, click the  button.
4. To remove *all* assigned Groups from a user, click the  button.
5. To assign a guaranteed privilege to the new user, select the privilege from the **Available Privileges** list on the left and click the  button. The privilege will now be listed in the **Guaranteed Privileges** list on the right. You can add more than one privilege to the list.
6. To remove a guaranteed privilege from the user, select the guaranteed privilege from the list and click the  button. The privilege will move back to the **Available Privileges** list and will no longer be guaranteed to the user.
7. To assign *all* available privileges to the user, click the  button.
8. To remove *all* guaranteed privileges from the user, click the  button.
9. To revoke a specific privilege or privileges from the user, select the privilege from the **Available Privileges** list on the left and click the  button. The privilege will now appear in the **Revoked Privileges** list on the right.
10. To remove a revoked privilege from the user, select the privilege on the right and click the  button. The privilege will no longer be revoked for this user.
11. To revoke all available privileges from the new user, click the  button.
12. To remove all revoked privileges from the user, click the  button.

## The Comment Tab

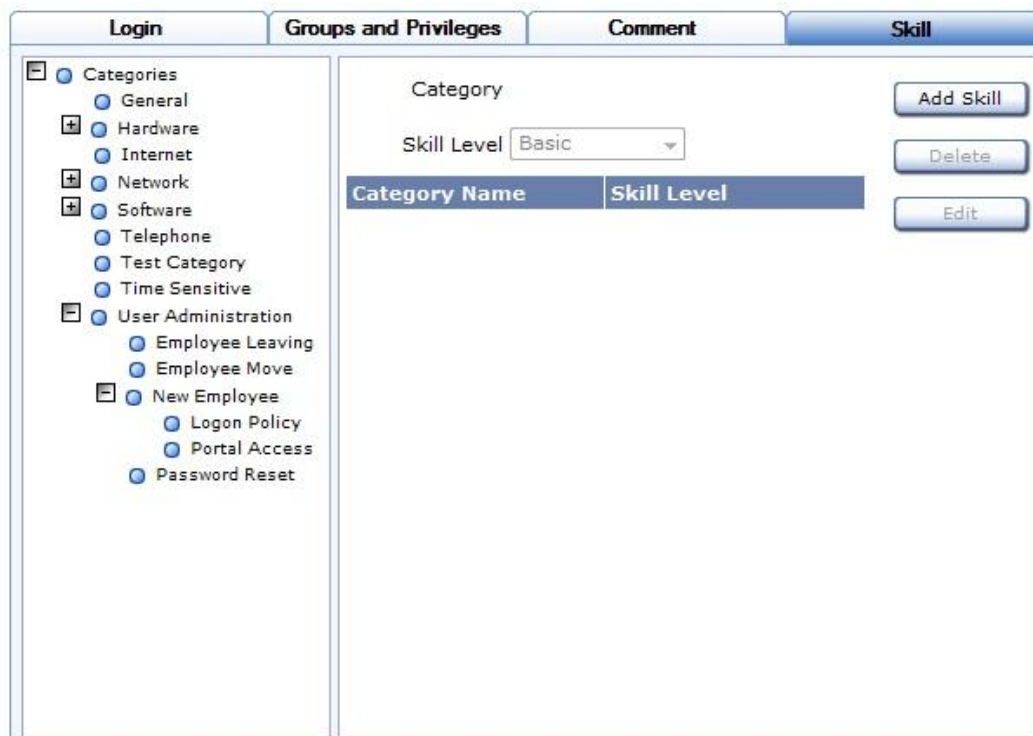
The Comment tab is comprised of one large text field. Enter any notes or comments about the user here.



The screenshot shows a tabbed interface with four tabs: "Login", "Groups and Privileges", "Comment", and "Skill". The "Comment" tab is selected and active. It contains a large text area with the text "This is a new User." and a cursor at the end of the line. The text area is bordered and has a small scrollbar on the right side.

## The Skill Tab

The Skill tab contains the specific skills the user may specialize in, as well as the skill level for each. These definitions make it easier to assign an Issue to a specific user who may be more qualified to handle the Issue than another user.



The screenshot shows a tabbed interface with four tabs: "Login", "Groups and Privileges", "Comment", and "Skill". The "Skill" tab is selected and active. On the left side, there is a tree view of categories. The main area on the right contains a form for adding skills.

**Categories:**

- ☒ Categories
  - ☐ General
  - ☒ Hardware
    - ☐ Internet
    - ☒ Network
    - ☒ Software
      - ☐ Telephone
      - ☐ Test Category
      - ☐ Time Sensitive
  - ☒ User Administration
    - ☐ Employee Leaving
    - ☐ Employee Move
    - ☒ New Employee
      - ☐ Logon Policy
      - ☐ Portal Access
      - ☐ Password Reset

**Skill Form:**

Category:

Skill Level:

**Buttons:** Add Skill, Delete, Edit

Category Name	Skill Level
---------------	-------------

### *To Assign a Skill to a User*

1. Select a skill from the cascading list on the left. The skill will then appear in the **Category** field on the right.
2. From the **Skill Level** drop-down menu, select the skill level that applies to the chosen skill.
3. Click the **Add Skill** button. The skill and skill level will now appear in the skills list on the lower right side of the window.
4. To edit a skill level, select the skill from the assigned skills list and click the **Edit** button. This will open the Skill – Edit window. Select the new skill level from the **Skill Level** drop-down menu, then click the **Save** button.
5. To remove a skill from the user, select the skill in the assigned skills list and click the **Remove** button. This will open the User Setup – Add window. Click the **Save** button.

### *To Edit a User*

1. Select the user you wish to edit from the User list.
2. Click the **Edit User Options** button. This will open the Edit User window.
3. Make any changes necessary, then click the **Save** button.

### *To Delete a User*

1. Select the user you wish to delete from the User list.
2. Click the **Delete** button. This will open the Users pop-up window.
3. Click the **Save** button. The user will no longer appear in the User list.

### *The User Options*

The User Options window allows you to define even more options for a specific user. The window contains two tabs;

- Email Settings Tab
- Miscellaneous Tab

## The Email Settings Tab

If you would like to set up custom email settings for a user instead of the settings defined in System Options, the Email Settings tab is where you will define them.

The screenshot shows the 'Email Settings' tab selected. The form contains the following elements:

- Please enter the User Name** (Section Header)
- SMTP Server Name (Text input)
- Port Number (Text input) and ☐ Use SSL (Default port for sSMTP is 465)
- Email Address (Text input)
- Email Display Name (Text input)
- ☐ My server requires authentication
- User Name (Text input)
- Password (Text input) and [Change Password](#) button
- ☒ Use Email Settings defined in System Options
- Default Email Template: [<Use System Options>](#) (Dropdown menu)

1. If you would like to use the email settings that you have already defined in the System Options, check the checkbox labeled **"Use email settings defined in System Options"** near the bottom of the tab. Otherwise, uncheck this checkbox and enter the email settings in the sections above this option.
2. Enter the SMTP server name, the port number, and the email address in the appropriate fields. These are all required. The **Email Display Name** field is optional.
3. Check the **"My Server Requires Authentication"** checkbox if necessary, and enter the user name and password in the appropriate fields.
4. In the **Default Email Template** drop-down menu, choose the template you would like to use, or just leave the default (<Use System Options>) setting as is.
5. Click on the miscellaneous tab to go to that tab, or click the **Save** button if finished.

## The Miscellaneous Tab

The Miscellaneous tab contains information for warning messages, search preferences, Issue preferences and dashboard alert options.

The screenshot shows the 'Miscellaneous' tab selected in a settings interface. It contains five sections: 'Warning Messages' with a checked checkbox for 'Show Contract Warning Messages'; 'Requester and Company Search Preference' with a checked checkbox for 'Use drop-down menus for requester and company on the issue screen.'; 'New Issue Assigned User' with a checked checkbox for 'When creating a New Issue, automatically set the Assigned User to the User who is currently Logged-in.'; 'Issue Status Change' with an unchecked checkbox for 'When the Status of an Issue changes and the Issue no longer has the Closed Status, reset the ResolvedBy and ResolvedDate.'; and 'Dashboard Alerts' with two numeric input fields, both set to '1', for 'Run dashboard alerts every' (Minutes) and 'Keep alert popups displayed for' (Seconds).

1. Check the **“Show Contract Warning Messages”** checkbox if you would like the user to be notified when a contract is about to expire.
2. Check the **“Use drop-down menus for Requester and Company on the Issue Screen”** checkbox if you would prefer drop-down menus over the search option.
3. Check the **“When creating a New Issue, automatically set the Assigned User to the User who is currently Logged-in”** checkbox if you wish to automatically assign the Issue to the active User.
4. Check the **“When the Status of an Issue changes and the Issue no longer has the Closed Status, reset the ResolvedBy and ResolvedDate”** checkbox if you would like these two fields to reset when they are no longer valid.
5. For Dashboard Alerts, use the number fields for the frequency of alerts and the duration of pop-ups.
6. Click the **Save** button when finished.



## Groups and Privileges

Help Desk Authority's security is structured around user Groups. Users in a Group are all granted the same privileges for access to specific functions of Help Desk Authority. A user can be a member of more than one Group, and specific privileges can also be granted at the user level for custom security options.

There are two tabs in the Groups and Privileges window:

- Groups
- Privileges

### The Groups Tab

The Groups tab is shown below.

The screenshot shows the 'Groups and Privileges' window with the 'Groups' tab selected. The window has a title bar with 'Groups and Privileges' and a 'Close' button. Below the title bar is a header bar with the same text. The main area contains a 'Select a Group' section with a table listing groups. The table has two columns: 'Name' and 'Description'. The first row is 'TEST DE434' with description 'Remove All Company Privileges'. The second row is '[Everyone]'. To the right of the table are up and down arrow buttons. Below the table are 'Add', 'Edit', and 'Delete' buttons. The bottom section is divided into four panes: 'Privileges Revoked from Group' (empty), 'Privileges Allowed for Group' (listing various asset-related privileges), 'Users not in Group' (listing several user names), and 'Users in Group' (listing four user names). Between the panes are buttons for adding and removing items (>, >>, <, <<). At the bottom right are 'Save' and 'Cancel' buttons.

Name	Description
TEST DE434	Remove All Company Privileges
[Everyone]	

Privileges Allowed for Group:

- Asset.Add
- Asset.Delete
- Asset.Edit
- Asset.Search
- AssetManufacturer.Add
- AssetManufacturer.Delete
- AssetManufacturer.Edit
- AssetManufacturer.Search
- AssetTemplate.Add

Users not in Group:



- Christopher Young
- Daniel Mummendey
- Douglas Hathorn
- Helpdesk Administrator
- Jeffrey Muschar
- Jillian Salamon
- Karunanidhi Kumar
- Kelley McGregor
- Vincent Ciotola

Users in Group:

- David Hoover
- Donald Buzard
- Scott Harker
- Timothy Melle



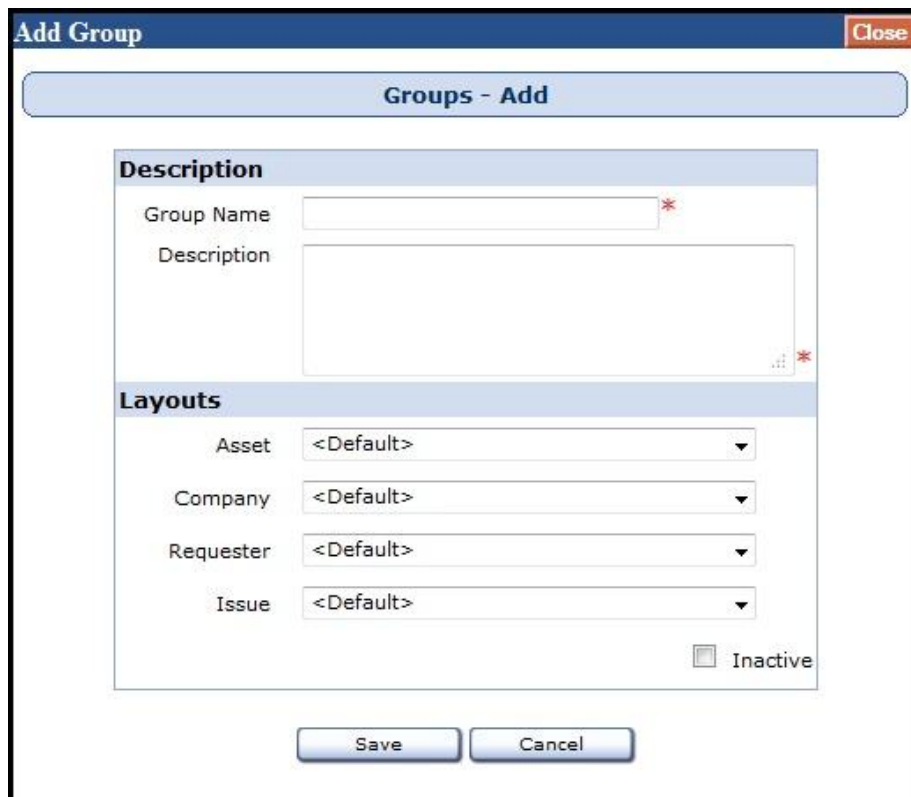
The Groups are listed for easy management. To edit Users and privileges in a group:

1. Once you have created several Groups, they can be prioritized within the Group list. The Group highest in the list will always take precedence over lower Groups. Group priority is important when a user belongs to more than one Group. To prioritize a Group, select the Group and move it up or down in the Group list using the  and  buttons.
2. To edit a Group, select the Group and click the **Edit** button. This will open the Edit Groups window. Make the edits to the Group then click the **Save** button.
3. To delete a Group, select the Group and click the **Delete** button. When prompted, click the **Save** button to confirm the deletion.
4. To set the Privileges for each group, select the group from the list, then move and privileges you would like to revoke from the group from the "Privileges Allowed for Group" list to the "Privileges Revoked from Group" list using the arrow buttons.
5. In the Users section of the Groups tab, select users from the "Users not in Group" list and move them to the "Users in Group" list using the arrow buttons.

## Creating a Group

In the Groups tab:

1. Click the **Add** button. This will open the Groups – Add window.



2. Enter the Group name in the **Group Name** field. This field is required.
3. Enter a description of the Group in the **Description** field. This field is also required.
4. In the "Select Windows Layouts" section, use the drop-down menus to select your preferred window layout for Assets, Companies, Requesters and Issues.

5. In the Privileges section of the Groups tab, you can select which privileges to allow or revoke for your new Group. Select the privilege and use the arrow buttons to move it to the preferred list (Allowed or Revoked).
6. Click the **Save** button when complete.

## The Privileges Tab

The Privileges tab is shown below.

The screenshot shows a window titled "Groups Privileges". At the top, there are two tabs: "Groups" and "Privileges", with "Privileges" being the active tab. Below the tabs, there is a section labeled "Select a Privilege" containing a dropdown menu labeled "Privilege Name" with the value "Asset.Add" selected. Below this, there are two large, empty rectangular areas with vertical scrollbars. The left area is labeled "Users With Privilege Revoked" and the right area is labeled "Groups With Privilege Revoked".

The Privileges tab in the Groups and Privileges window is used for information only. At the privilege level, it will tell you at a glance which users and which groups have this privilege revoked.

To view information about a specific privilege, select it from the **Privilege Name** drop-down menu. In the Lists below, you will see all Users with the privilege revoked, and the groups with the privilege granted.

## Chapter 3 – Issues

Issues are items that are tracked from inception to closure. Issues track information on reported incidents including:

- Who reported the Issue
- To whom the Issue was assigned
- The Issue Category, Priority, and Status
- The Assets involved
- The actions taken toward resolution
- Time spent and associated costs

Accurate Issue records will help you to optimize resolution time, better manage your workloads, and facilitate communication with your customers.

Help Desk Authority's Issue management enables you to:

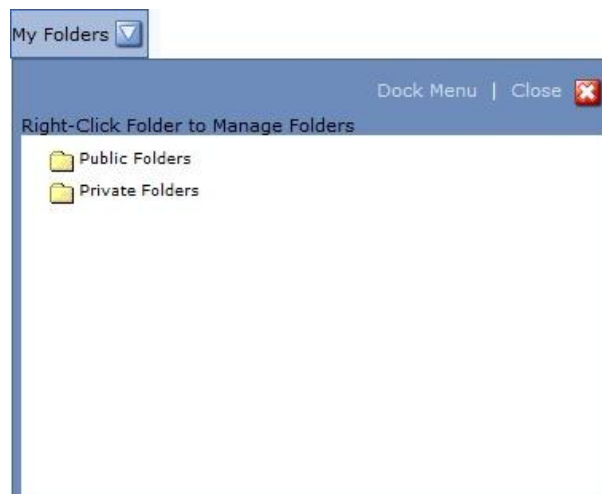
- Link related Issues with dependencies promoting easy and logical workflow.
- Route Issues to personnel based on Group, Status, and expertise using Skills Based Assignment.
- Apply your organization's hours of operation to accurately age and manage Issues.
- Link Issues to Products you support and Contracts you service.

### The Issues Main Menu



The Issues main menu consists of several menus that you will use to view and update Issues. Each drop-down menu will be covered in detail in this chapter.

### My Folders



You will notice that some of the drop-down menus in the main menu are “dockable” by using the Dock Menu option. When you dock a menu, you keep it open on the left side of the Issues list, as shown below.



In this screen shot, the **My folders** drop-down menu is now open and docked. You can un-dock it at any time by clicking the red “X” button.

If you hover your cursor over a folder, you will see the following tooltip:

Right-Click to Manage Folders

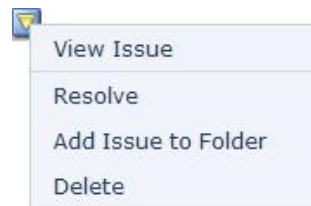
Right-clicking on a folder will present you with the following pop-up menu:



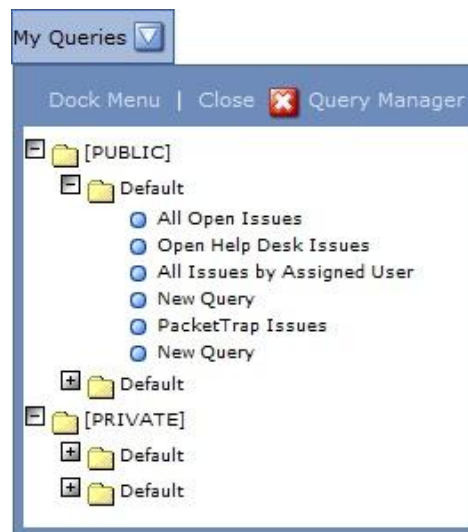
To better organize your Issues, you can create folders under the Public folder and the Private folder. To do this, select **New Folder** from the pop-up menu. This will open the Add folder window. Enter a name in the **Folder Name** field and click the **Save** button. The new folder will now appear in the folder tree as shown below.



Once you create folders, you can move Issues into those folders using the Issue selection box shown below. Select **Add Issue to Folder**. This opens the Add Issue to Folder window. Select a folder and click the **Save** button. The Issue is now added to the folder.



## My Queries



Queries are organized in the My Queries drop-down menu. As you can see, Queries are grouped into folders similar to Issues. Simply select a Query to run it and view the results in the Issues window.

Queries are added to the My Queries drop-down menu by using the Query Manager. To access the Query Manager, click the **Query Manager** link in the My Queries drop-down menu.

## The Query Manager

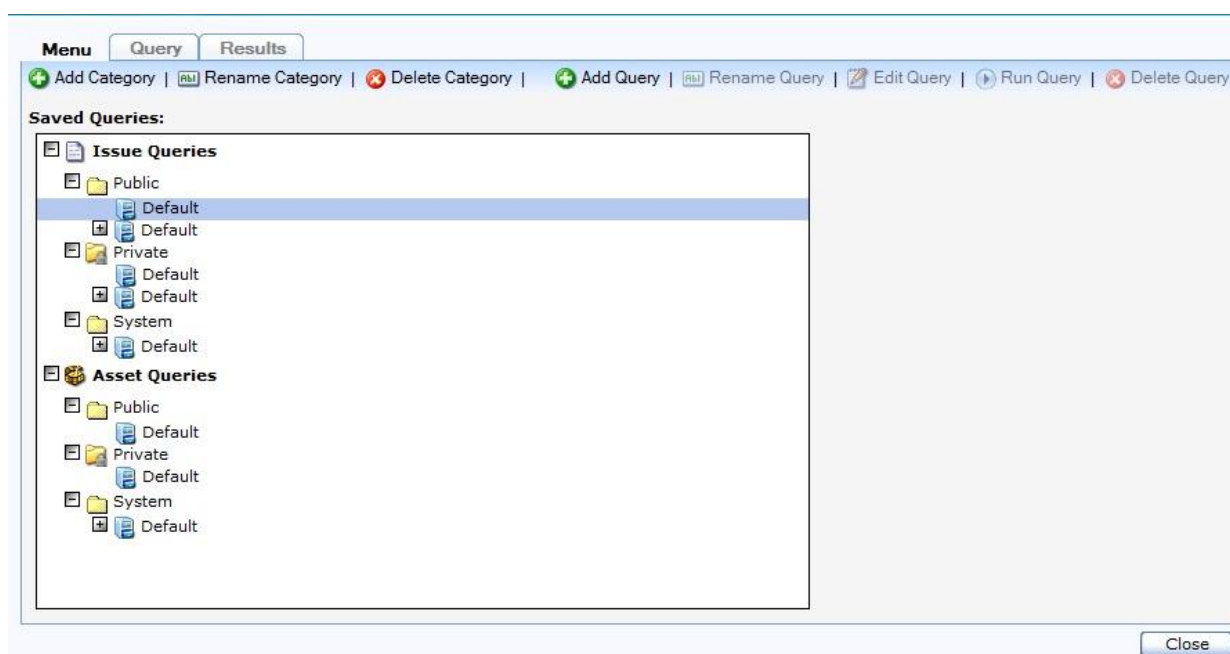
Help Desk Authority gives you access to complete Issue history through Queries. Queries allow you to specify selection criteria for any Issue field, including custom fields. For example, you may want to search for Issues entered during a particular time period, or Issues with a particular Status, or containing a certain word in the Description.

Regardless of the search you specify, you can save your Queries and run them at any time. Saved Queries can also be used for reports.

There are three tabs in the Query Manager:

- The Menu Tab – Where Queries are categorized are managed.
- The Query Tab – Where new Queries are created by adding conditions.
- The Results Tab – Where the results of queries are displayed.

Each tab will be described in detail during this chapter.











### The Menu Tab

The Menu tab is where all Queries are managed. There are two sections of the menu tab.

- The Toolbar
- The Saved Queries section

## The Toolbar

Toolbar Item	Result
 Add Category	Click to add a new Query category.
 Rename Category	Select a Query category and click this button to rename.
 Delete Category	Select a Query category and click this button to delete it.
 Add Query	Click to add a Query. Opens the Conditions tab.
 Rename Query	Select a Query and click this button to rename it.
 Edit Query	Select a Query and click this button to edit it (opens the Conditions tab).
 Run Query	Select a Query and click this button to run it (opens the Results tab).
 Delete Query	Select a Query and click this button to delete it.

### Creating / Editing a Query Category

Queries are organized into Categories. These Categories are arranged into folders in a directory. The two main folders are Issue Queries and Asset Queries. Both of these main folders contain two main folders; Public and Private. The Public and Private folders are system-defined. You can define as many Sub-Categories under these two folders as you like.

Queries that are filed in the Public folder are available for anyone to use. Queries that are filed in the Private folder are only accessible to the User who defined the folder.

To Create, Rename or Remove a Query category:





1. Choose a Main category for your Query (Issue or Asset), and then select the Public or Private folder.
2. Click the **Add Category** icon.
3. Enter a name for the new category.
4. Press **Enter**.
5. To rename a category, either double-click the category or select it and click the **Rename Category** icon. Enter the new name and press **Enter**.
6. To remove a category, select the category and click the **Remove Category** icon. When prompted for verification, click the **Yes** button.

## The Query Tab

The Conditions tab is where all queries are created and edited.

To open the Conditions tab, either click the **Add Query** button on the Menu tab, or select a Query and click the **Edit Query** button.

At the top of the Conditions tab is a toolbar with four buttons.

Button	Result
 Reset	Resets the Query to its original state or an empty state.
 Save	Saves the Query.
 Save As	Saves the Query in a designated location in the folder tree.
 Run Query	Runs the Query (and opens the Results tab).

## Creating / Editing a Query

To create a new Query:

1. With the category of your choice selected, click the **Add Query** button. This will open the Query tab.
2. Add a condition.
3. Select a condition (operand) (see *Query Building*) you would like to add to the Query.
4. Click the **Add Condition** button.
5. Modify the condition if necessary with operators (see *Query Building*).
6. Add more conditions if necessary
7. Run the Query as a test. This will open the Results tab.
8. If the Query meets your expectations, go back to the Query tab and save the Query.
9. To edit an existing Query, select the Query in the Menu tab and click the **Edit Query** button. This will open the Query tab for editing. Change the Query to your specifications and save.
10. To delete (remove) a Query, select the Query in the Menu tab and click the **Delete Query** button.

## The Results Tab

The Results tab displays the results of the current Query.

The **Query Layout** drop-down menu allows you to choose the format in which the results will appear (based upon pre-defined Issue List Layouts).

Also in the Results tab is a Refresh pane similar to the Refresh pane in the Issue window.

In the upper-right corner of the Results tab is the **Export** drop-down menu.



Any set of Query results can be exported to Excel, HTML or as a CSV text file.



## Query Building

Building Queries can be simple or complex depending upon your needs. Building a Query is not always intuitive, especially if you have no database experience. Help Desk Authority has simplified the process to allow even a beginning user to develop a wide range of queries without regard to complexity.

In this section we will cover the concepts you should be familiar with to build any Query you desire.

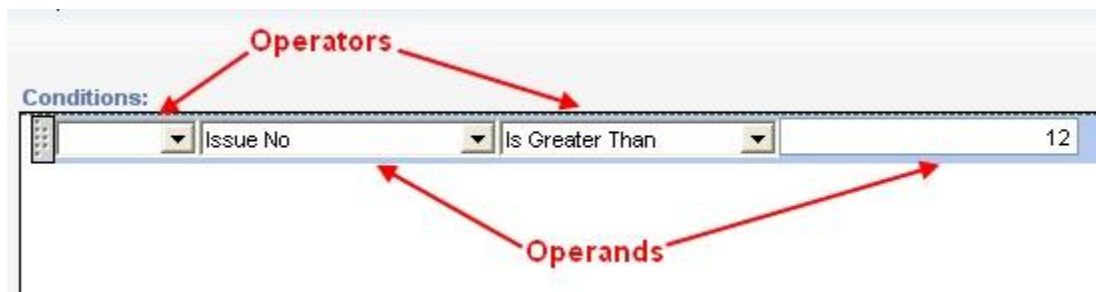
### Query Elements

There are various elements to queries that will help you understand how they are built and how the different elements interact.

The first element is the *operand*. The operand is the condition or element (in the case of Help Desk Authority, the operand is usually a field) that is to be the subject of a comparison in order to produce a subset of data. In Help Desk Authority, some common operands are Issue No., Status, Contract, Asset, Requester and Impact.

The second (and related) element is the *operator*. The operator is the element that defines the comparison. In Query building, some common operators are Equals, Is Greater Than, Is Less Than, Is In, and Is Between. These would be considered primary operators. There are also secondary operators that are used when comparing two or more conditions. Examples of secondary operators would be Or, And and Not.

**Example 1:** A simple Query condition.



In the example above, the Query will return all Issues where the Issue No (operand) is greater than (operator) 12 (operand).

To add an operator to a condition, select the condition and use the drop-down menu to select an operator OR use the **Not**, **And** and **Or** buttons. If a particular operator is not available for the currently selected condition, the operator will not appear in the drop down menu, and if the button is clicked, nothing will happen.

In the next example, we will add another operator.

**Example 2:** A Query condition with two operators

The screenshot shows a 'Conditions' panel with a single condition. The first dropdown is 'NOT', the second is 'Folder', the third is 'Equals', and the fourth is 'Upgrade Project'.

In this example, we have added the NOT operator. This Query will return all Issues where the Folder name does NOT equal "Upgrade Project".

If you need a more complex Query to suit your needs, you can add another condition.

**Example 3:** A Query with two conditions

The screenshot shows the 'Conditions' panel with two conditions. The first condition is 'NOT Folder Equals Upgrade Project'. The second condition is 'And NOT Folder Equals KB Issues'.

In this example, we have added another condition to the previous example. This Query will now return all Issues where the folder name does not equal "Upgrade Project" AND does not equal "KB Issues". Thus, the Issue must meet both conditions to be returned in the Query.

Do not confuse this with the example below.

The screenshot shows the 'Conditions' panel with two conditions. The first condition is 'NOT Folder Equals Upgrade Project'. The second condition is 'Or NOT Folder Equals KB Issues'. The 'Or NOT' dropdown is circled in red.

In this case, we used "Or NOT" instead of "And NOT". Using "Or NOT" means that only one condition must be met to return the Issue. So if an Issue with a folder name of "KB Issues" came through this Query, it would pass the first condition but not the second. And since only one condition must be met, this Issue would be returned in the Query. In the prior example, it would not be returned because it would have to meet both conditions.

#### Example 4: A Query with three conditions

Conditions:						
	▼	Issue No	▼	Is Greater Than	▼	12
And	▼	Issue No	▼	Is Less Than	▼	36
Or	▼	Issue No	▼	Equals	▼	57

Often, you will want to return Issues that meet a very specific set of conditions. For example, the above Query will return all Issues where the Issue number is between (but not including) 12 and 36, OR and Issue where the Issue number equals 57 (there is only one, of course).

Although effective, Queries like this and others that are even more complex require something to make them simple. This is where grouping comes in.

### Grouping

Grouping is simply joining two or more conditions together for simplicity.

To Group conditions:

1. Select the first condition to be grouped by clicking on it.
2. Select the second condition to be grouped by using **Shift-click**. Both conditions will now be highlighted. Note that you can only group adjacent conditions together. If you want to group two conditions that are not adjacent in the list, you can move a condition by clicking on the handle and dragging it to the desired location in the list.
3. Click the **Group** button.
4. To ungroup conditions, select the Group and click the **UnGroup** button.

#### Example 1: Grouping two conditions in a three-condition Query

Conditions:						
	▼	Issue No	▼	Is Greater Than	▼	12
And	▼	Issue No	▼	Is Less Than	▼	36
Or	▼	Issue No	▼	Equals	▼	57

This is the same Query from Example 4 in the last section, and it will return the same result, but in this case, the first two conditions have been grouped together. In a Query like this, grouped conditions are performed first before other conditions. It may be helpful to think of the grouped conditions as being enclosed in parenthesis, such as in a math problem:

**(If the Issue number is greater than 12 and less than 36) OR If the Issue number is 57.**

Let's take a more complex example. Suppose you want to see all Issues within a certain due-date range that also contain either one of two different Priorities. This would be fairly complicated to do without grouping conditions.

### Example 2: A Query with two sets of Grouped conditions

Conditions:

		Due Date	Is Greater Than or Eq	1/1/2010 12:00 AM
And		Due Date	Is Less Than or Equal	6/30/2010 12:00 AM
And		Priority	Equals	1 - Urgent
Or		Priority	Equals	2 - High

This Query will return all Issues with a due date between (and including) January 1, 2010 and June 30, 2010 **AND** have a Priority of 1 - Urgent or 2 - High. The Issue must meet the group of Due Date conditions **AND** the group of Priority conditions in order to be returned.

Represented another way:

**(If the Due Date is between 1/1/2010 and 6/30/2010 inclusive) AND (The Priority is either 1 – Urgent Or 2 – High)**

### Example 3: A Query with two sets of grouped conditions plus a single condition

Conditions:

		Due Date	Is Greater Than or Eq	1/1/2010 12:00 AM
And		Due Date	Is Less Than or Equal	6/30/2010 12:00 AM
And		Priority	Equals	1 - Urgent
Or		Priority	Equals	2 - High
And		Company	Equals	Titan Software, Inc.

In this final example, this fairly complex Query groups two groups into a single group, then adds one more condition. This Query will return any Issue where “Titan Software, Inc.” is the company, and the Due Date of the Issues range from 1/1/2010 to 6/30/2010, and the Issue has a Priority of 1 – Urgent or 2 – High.

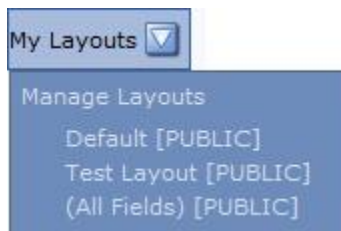
**[(If the Due Date is between 1/1/2010 and 6/30/2010 inclusive) AND (The Priority is either 1 – Urgent Or 2 – High)] And the company Name is “Titan Software, Inc.”**

## Common Queries



The Common Queries menu simply contains the most common Queries you will be using. Select the query you would like to run from the drop-down menu and the results will be presented in the list.

## My Layouts



The My Layouts menu contains the default and custom layouts that you use to view Issue lists. The menu will also contain a layout called All Fields, in which all of the fields of an Issue are shown in the list view.

These layouts are managed in the List Layout Manager (covered in the previous chapter under *List Layouts*).

## Export



The Export drop-down menu allows you to export Issue lists, Asset lists or Query Results into CSV, Excel or HTML formats. While viewing the list you wish to export, select the export format from the menu.

If you chose CSV or Excel as your Export format, you will be presented with a pop-up notification asking you if you'd like to Open or Save the file. If you select Save, you will be prompted to choose the location.

If you select HTML as your Export format, you will see the results presented in a web browser.

## Open Issue

If you know the number of an individual Issue you would like to view, enter it in the Open Issue field in the main menu and click the Go button. This will open the Issue window of the Issue you entered if it exists. If the Issue does not exist, you will be presented with a notification informing you that it does not exist.

## The Filter Bar



You can narrow your Issue List with filters as defined in the table below.

Filter	Result
Status	Choose between All, Open, Closed, Pending and Suspended
Priority	Choose between Urgent, High, Medium and Low.
Date Received	Choose a value from the drop-down calendar

You can use any one filter, or any combination of filters. To clear your filters and start over, click the **Clear Filter** button.

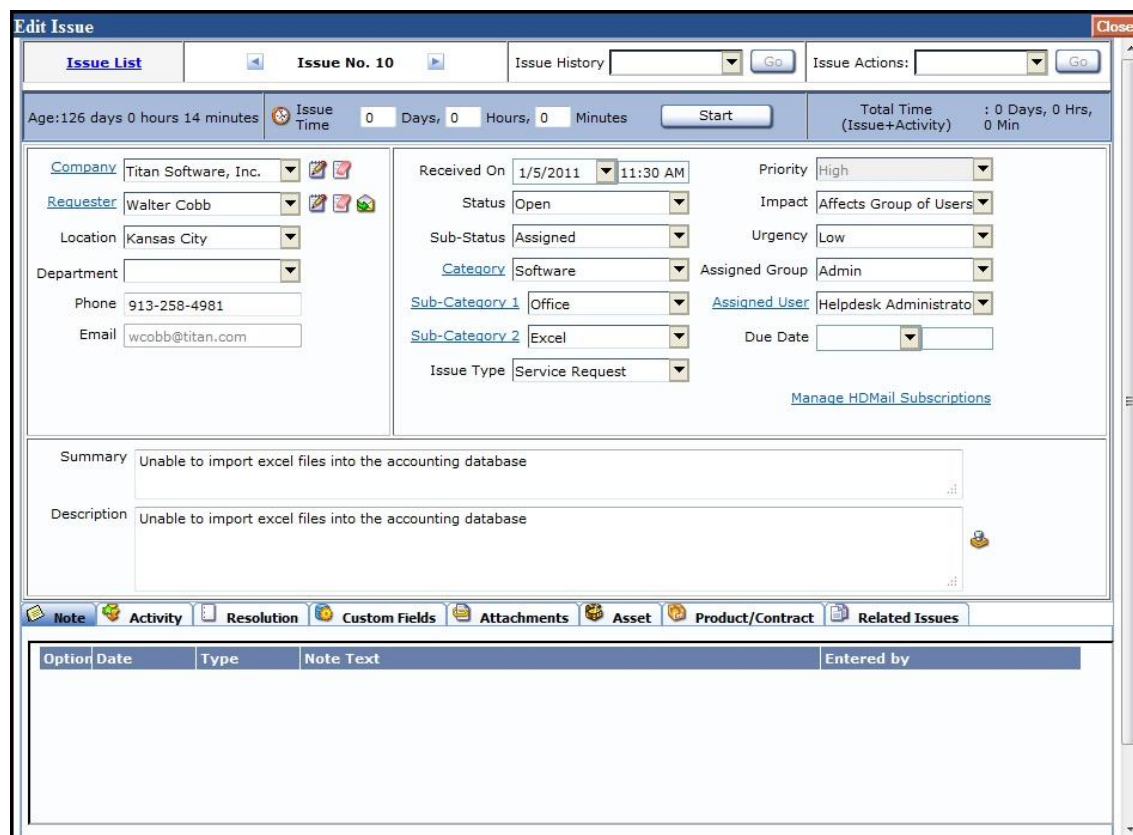
## The Options Menu

In the left-most column of every Issue records is the Options menu (shown below). From this menu, you can view an Issue, resolve an Issue, add an Issue to a folder or delete an Issue.



## View Issue

Selecting View Issue opens the Edit Issue window shown below.

A screenshot of the "Edit Issue" window. The window has a title bar with "Edit Issue" and a "Close" button. Below the title bar is a navigation bar with "Issue List" and "Issue No. 10". The main area is divided into several sections. On the left, there are fields for "Company" (Titan Software, Inc.), "Requester" (Walter Cobb), "Location" (Kansas City), "Department", "Phone" (913-258-4981), and "Email" (wcobb@titan.com). On the right, there are fields for "Received On" (1/5/2011 11:30 AM), "Status" (Open), "Sub-Status" (Assigned), "Category" (Software), "Sub-Category 1" (Office), "Sub-Category 2" (Excel), "Issue Type" (Service Request), "Priority" (High), "Impact" (Affects Group of Users), "Urgency" (Low), "Assigned Group" (Admin), "Assigned User" (Helpdesk Administrator), and "Due Date". Below these fields is a "Summary" section with the text "Unable to import excel files into the accounting database" and a "Description" section with the same text. At the bottom, there is a tabbed interface with tabs for "Note", "Activity", "Resolution", "Custom Fields", "Attachments", "Asset", "Product/Contract", and "Related Issues". The "Note" tab is selected, showing a table with columns "Option", "Date", "Type", "Note Text", and "Entered by".

## Resolve

Choosing this option will convert the Status of the Issue to Closed.

## Add Issue to Folder

As covered in the previous section (*My Folders*), selecting this option will allow you to move an Issue into an Issue folder for easy organization and management of Issues.

## Delete

Selecting this option will delete the Issue from the database. You will be prompted by a pop-up to confirm the deletion before the Issue is deleted.



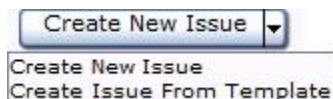
## Creating a New Issue

The main function of Help Desk Authority is Issue management. From creation to resolution, Issues are tracked and updated through the various tools the application has to offer. When your help desk receives a call, most of the time it will be for a new Issue.

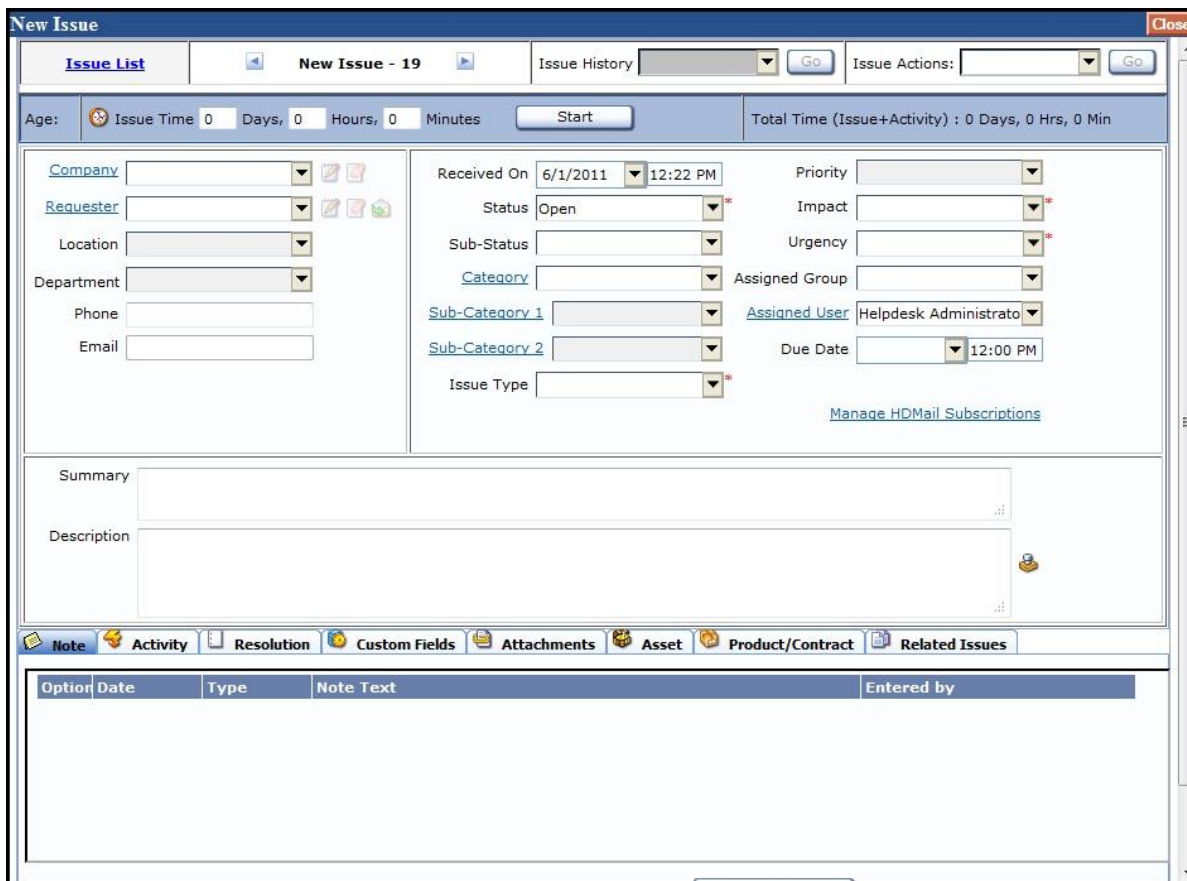
### The Issue Window

In the main window, with Issues selected in the Navigation pane, click the **Create New Issue** button.

You can also click the down-arrow button next to the **Create New Issue** button and choose from “Create New Issue” or “Create Issue from Template”.



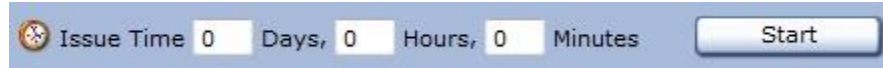
This will open the New Issue window shown below.

A screenshot of the 'New Issue' window in the Help Desk Authority application. The window has a title bar with 'New Issue' and a 'Close' button. Below the title bar is a navigation pane with 'Issue List' selected. The main area contains a form for creating a new issue. The form is divided into several sections: 'Company' (with fields for Company, Requester, Location, Department, Phone, and Email), 'Received On' (6/1/2011 12:22 PM), 'Status' (Open), 'Sub-Status', 'Category', 'Sub-Category 1', 'Sub-Category 2', 'Issue Type', 'Priority', 'Impact', 'Urgency', 'Assigned Group', 'Assigned User' (Helpdesk Administrator), and 'Due Date' (12:00 PM). There are also 'Issue Time' and 'Total Time (Issue+Activity)' fields. At the bottom, there are tabs for 'Note', 'Activity', 'Resolution', 'Custom Fields', 'Attachments', 'Asset', 'Product/Contract', and 'Related Issues'. The 'Note' tab is active, showing a table with columns 'Option', 'Date', 'Type', 'Note Text', and 'Entered by'.



## The Issue Timer




To the right of the Issue window toolbar is the Issue timer. When working on Issues, you will often have the need to keep track of the amount of time that is spent. When you begin work on an Issue, click the **Start** button.



The timer will run until you either save the Issue or click the **Stop** button.

Help Desk Authority does not keep track of seconds when dealing with Issue time. The seconds are rounded up or down to the nearest minute. When you re-start the timer, the seconds will be reset to zero and the minutes will be rounded to the nearest minute.

## To Create a New Issue

1. In the New Issue window, select the Company associated with the Issue from the **Company** drop-down menu, or type the Company name in the field. The field label for the **Company** field is also a link that will open the Issue Company window. You can search for a Company based on a set of criteria and then select a Company to use for this field.
2. Select the name of the Requester associated with the Issue from the **Requester** drop-down menu or type the Requester name in the field. The field label for the **Requester** field is also a link that will open the Requester window. You can search for a Requester based on a set of criteria and then select a Requester to use for this field.
3. There are three small icons next to the **Requester** field. They are described below.
4.  View Requester. This will open the Requester – Edit window.
5.  Clear Requester. This will remove the Requester name from the **Requester** field.
6.  Email Requester. This will compose an email to the Requester.
7. In the **Location** field, if the location has not already been pre-populated due to the Requester selection, use the drop-down menu to choose the location.
8. In the **Department** field, if the department has not already been pre-populated due to the Requester selection, use the drop-down menu to select the appropriate department.
9. In the **Phone** field, if the phone number has not already been pre-populated due to the Requester selection, enter the phone number.
10. In the **Email** field, a value will automatically populate if the selected Requester has an email address. If not, this field will contain no value. The value that populates this field is an email link that can be used to send an email to the Requester once the new Issue has been saved.
11. In the **Issue History** drop-down, you can take a look at all Issues for the selected Company or Requester. This is not a field that will retain your selection. It is a reference tool to be used when the field is created or edited. To view the selected Issue history, click the **Go** button. This will open a new Issue list window containing those selected Issues.
12. The **Issue No** field will be automatically populated with the new Issue number.
13. In the **Received On** field, use the drop-down menu to select a date from the drop-down calendar. Initially, the date and time will be automatically populated with the current date and time. Both the date and time values can be edited or entered directly in the field if a change is necessary. You can enter the date and time in any format you like. Both values will automatically reset themselves to the correct format of m/d/yyyy and hh:mm:ss AM/PM.
14. The **Status** field will be automatically populated with a value of “Open”. This can be changed by using the drop-down menu and selecting a value. This field is required.

15. If this Issue requires a Sub-Status, use the **Sub-Status** drop-down menu and select a Sub-Status from the list.
16. In the **Category** field, select a Category from the drop-down menu. The field label for the **Category** field is also a link that will open the Issue Categories window. You can select a Category from the list and click the **Select** button, or you can create a new Category to use by clicking the **Add** button and then clicking the **Select** button to use the new Category. You can also create a Sub-Category from this window. Categories can also be edited or deleted by using the **Edit** or **Delete** buttons.
17. If you would like to use a Sub-Category for the new Issue, use the **Sub-Category 1** drop-down menu. The **Sub-Category 1** drop-down will be populated with all Sub-Categories associated with the selected Category (if any exist). Also, the field label for the **Sub-Category 1** field is a link that will open the Issue Categories window as in the previous step.
18. If a Sub-Category is chosen, the **Sub-Category 2** drop-down menu will be automatically populated with second level Sub-Categories that are under the selected Sub-Category (if any exist). The **Sub-Category 2** field will also become a link (if an initial Sub-Category has been selected) that will open the Issue Categories window as in the two prior steps.
19. In the **Issue Type** drop-down menu, select an Issue type. This field is required.
20. In the **Priority** field, select the appropriate Priority from the drop-down menu.
21. In the **Impact** field, select the appropriate Impact from the drop-down menu. This is a required field.
22. In the **Urgency** field, select the appropriate Urgency from the drop-down menu. This is a required field.



You will notice that after selecting a Priority level, your selection may be automatically changed when you select an Impact and/or Urgency. These automatic changes are based upon Priority Mapping settings (covered in Chapter 3).

In the Priority Mapping section of the Administration window, if the checkbox labeled **"Automatically assign Issue Priorities based on Impact and Urgency"** is checked, your previously selected Priority level may be changed.

To gain more control over Priority settings, you will be able to go back to the Priority field and manually override the automatically selected Priority setting if the **"Allow users to manually override Priority settings"** checkbox has been checked in the Priority Mapping section of the Administration window.

23. In the **Assigned Group** field, select the Group assigned to the Issue (if applicable) from the drop-down menu.
24. In the **Assigned User** field, select the user assigned to the Issue from the drop-down list. If an Assigned Group has been selected, the only users available in the **Assigned User** drop-down menu will be members of that Group. The **Assigned User** field label is also a link that will open the Skills Based User window. To locate users in the Skills Based User window, select a Category/Skill from the left pane, then a Skill Level from the right pane. Click the **Refresh** button. All users matching the selected criteria will be listed in the Users list pane.

25. In the **Due Date** field, select the appropriate due date for the Issue from the drop-down calendar. Both the date and time values can be edited or entered directly in the field if a change is necessary. You can enter the date and time in any format you like. Both values will automatically reset themselves to the correct format of m/d/yyyy and hh:mm:ss AM/PM.
26. The **Age** field will be automatically populated by Help Desk Authority.
27. The link for **Manage HDMail Subscriptions** will open the Subscription Management window for the Issue. The primary Requester and the assigned User will automatically be subscribed to the Issue. You can also add Requesters and users to the Subscription list by selecting them from the drop-down menus. To remove an individual from the list, click the red "X" icon next to the name. Click the **Save** button when finished.
28. To add a summary to the Issue, enter it in the **Summary** text field.
29. To add a description to the Issue, enter it in the **Description** text field. To place a time stamp on your entry, use the time stamp button.

### *Tabs in the Issue Window*

The bottom pane of the Issue window consists of seven tabs as shown below. Each tab will be explained in detail.



### The Note Tab

To add an Activity Note to the Issue:

1. Click the **Add Note** button. This will open the Activity Note – Add window.
2. Select the activity type in the **Activity Type** drop-down menu.
3. Select the User applicable to the note in the **Entered By User** drop-down menu.
4. The **Activity Date/Time** field will be automatically populated with the current date and time. To override this, you may select a date from the drop-down calendar or simple enter a date and time into the field. Help Desk Authority will convert your entry to the correct format of m/d/yyyy and hh:mm:ss AM/PM.
5. Enter the time spent on this Activity by using the **Days**, **Hours** and **Minutes** fields.
6. If there is a cost associated with the activity, the cost will appear in the **Cost** field. Note that this only occurs if the cost is based on days, hours or minutes. customers with yearly or monthly contracts (one set price) will not see an amount in the **Cost** field.
7. If the cost for this Activity is billable (in general, billable outside of a support contract, or when the existing contract is based upon time spent per incident), check the **Billable** checkbox.
8. Enter the text of the note in the **Note** field.
9. Click the **Save** button when finished. The new note will now be seen in the Note list under the Note tab as well as the Activity list under the Activity tab.
10. To edit a note, select **Edit Note** from the selection box menu under the Options column (or click the note itself). Edit the note and click the **Save** button when finished.
11. To delete a note, select **Delete Note** from the selection box menu under the Options column and click the **OK** button at the prompt to delete.

## The Activity Tab

To add an Activity to the Issue:


1. Click the **Add Activity** button. This will open the Activity Note – Add window.
2. Select the activity type in the **Activity Type** drop-down menu.
3. Select the User applicable to the note in the **Entered By User** drop-down menu.
4. The **Activity Date/Time** field will be automatically populated with the current date and time. To override this, you may select a date from the drop-down calendar or simple enter a date and time into the field. Help Desk Authority will convert your entry to the correct format of m/d/yyyy and hh:mm:ss AM/PM.
5. In the Time Spent section, if applicable, enter the time spent on this Activity by using the **Days, Hours** and **Minutes** fields.
6. If there is a cost associated with the activity, the cost will appear in the **Cost** field. Note that this only occurs if the cost is based on days, hours or minutes, or if the cost is per incident. customers with yearly or monthly contracts (one set price) will not see an amount in the **Cost** field.
7. If the cost for this Activity is billable (in general, billable outside of a support contract, or when the existing contract is based upon time spent, such as an hourly rate, or if the cost is a set cost per incident), check the **Billable** checkbox.
8. Enter the text of the note in the **Note** field.
9. Click the **Save** button when finished. The new note will now be seen in the Note list under the Note tab as well as the Activity list under the Activity tab.
10. To edit an Activity, select **Edit Activity** from the selection box menu under the Options column (or click the note itself). Edit the activity and click the **Save** button when finished.
11. To delete an activity, select **Delete Activity** from the selection box menu under the Options column and click the **OK** button at the prompt to delete.





Under the Activity tab, you will notice two counters; Activity Total Time and Total Cost (shown below). These counters will track the time and cost of the Issue and will be automatically updated with each new Activity in the Issue.

Total Cost 0 Activity Total Time 0 0 0

## The Resolution Tab

There are two methods available to resolve an Issue. As discussed earlier, you can click the **Resolve Issue** link in the selection box menu in the Issue list. You can also click the  button under the Resolution tab. Both actions will populate the **Resolved By** and **Resolved Date** fields under the Resolution tab with the current User and the current date and time.

To resolve an Issue from the Resolution tab:

1. Click the red resolution button (  ). This will populate the **Resolved By** and **Resolved Date** fields with the current user and the current date and time.
2. In the Resolution text area, enter any notes that are applicable to the resolution. Use the  button to include the date and time of the note.
3. Click the **OK** button when finished, or select another tab to enter more information.

## The Custom Fields Tab

If there are any custom fields in the Issue, they will appear here in the Custom Fields tab. Complete any custom fields that are necessary.



## The Attachments Tab

Use the Attachments tab to include any attachments necessary in the Issue.

1. To attach a file, click the **Browse** button, browse to the correct file in the Open window and click the **Open** button.
2. Click the **Attach File** button. The file will now be attached to the Issue and will be placed in the attachments directory you've previously configured.
3. To attach a URL, click the **Attach URL** button. This will open the Attach URL window. Enter the Web Address (URL) in the **Web Address** field, then enter a description in the **Description** field (both fields are required). Click the **Save** button when finished. Note that you must include "http://" with the URL.
4. To open an attachment, click on it. The attachment will open in the default program you have selected. You can also use the selection box to the left of the attachment and select **View**.
5. To delete an attachment, select the attachment and click the **Delete** button, then click **OK** at the prompt.
6. Click the **OK** button when finished, or select another tab to enter more information.

## The Asset Tab



The Asset tab allows you to associate an Asset or Assets to the Issue if necessary.

1. The **Asset** field label is a link. Click it to open the Assets window.
2. Use the Query controls in the top section of the Assets window to view the list of Assets available for this Issue.
3. Select the name of the Asset you wish to associate with the Issue by clicking on the name. This will populate the fields in the Asset tab of the Issue window.
4. The name of the Asset should now be present in the **Asset** field. To edit the Asset, click the  icon. To remove the Asset from the Issue, click the  icon.
5. The remaining fields (**Tag**, **Asset Type**, **Manufacturer**, **Owner** and **Model**) will most likely be populated from the information in the Assets window. These fields cannot be edited. To change the values in these fields, open the Asset in the Asset window, make the appropriate changes, then click the **Save** button.


## The Product/Contract Tab

The Product/Contract tab allows you to attach a Product and/or a Contract to the Issue. You can also attach a note in the bottom section of the tab if necessary.

To attach a Product:

1. In the Product Information section, use the **Product Name** drop-down menu to select a Product, or use the  icon to open the Select Product window.
2. You will be presented with a list of Products that are currently assigned to the Company or the Requester. Use the selection box next to the Product you would like to attach to the Issue and select either **Assign to Requester** or **Assign to Company**.
3. The Product will now appear in the **Product** field. If a reference number and a PO number have been assigned to the product, they will appear in the **Reference No.** and **PO No.** fields. These fields cannot be edited.
4. Enter the version number in the **Version** field and the build number in the **Build** field if necessary.
5. To remove a product from the Issue, click the  icon.

To attach a Contract:

1. In the Contract Information section, use the **Contract Name** drop-down menu to select a contract, or use the  icon to open the Select Product window.
2. Select a contract type and use the selection box to **Assign to Requester** or **Attach to Company**.
3. In the **Cost** field, enter the cost per (Contract, incident, hour, etc.).
4. In the **Warning %** field, enter a value from 1 to 100. When the Support Contract has been used down to this specified percentage, the user will receive a notification that the Contract may soon expire.
5. If this is a warranty Contract, check the **Warranty** checkbox. The **Cost** field can be left blank.
6. Enter the reference number in the **Reference No.** field if necessary.
7. Enter any comments in the **Comments** field.
8. If the contract is based on duration, select the **Start Date** and **End Date** in the drop-down calendars provided.
9. If the contract is based on service minutes, enter the number of service hours and minutes in the **Hours** and **Minutes** fields, then select the start date in the **Start Date** drop-down calendar.
10. If the contract is based on total Issues, enter the number of issues in the Contract Issues field, then enter the **Start Date** and **End Date** in the drop-down calendars provided.
11. Click the Product tab to link a Product to a contract.
12. From the Available Products list, move products to the Products Linked to This Contract list with the arrow buttons.
13. Click the **Save** button when finished.

## The Related Issues Tab

Under the Related Issues tab you can establish a parent/child relationship between two or more Issues.

1. If the Issue will be dependent on a parent Issue, check the **Dependent On Parent** checkbox.
2. Click the **Issue Number** link to view the Issue list. Click on the number of the Issue you would like to relate to the current Issue. The number will populate the **Issue Number** textbox.
3. Click the **Link** button to link the Issues. This opens the Change Relationship window.
4. Select either **Child** or **Parent** for the Issue you are relating to the current Issue.
5. Click the **Save** button.
6. The Issues will now be related. Use the selection box in the Options column at any time to View/Edit the Issue, change the relationship, or remove the related Issue.

## Editing an Issue

In your daily support activities you will most likely open and update existing Issues on a regular basis as you work toward the resolution of those Issues.

1. Open the Issue.
2. If anything has changed in the top portion of the Issue, make those changes.
3. You will often be adding Activities or Notes to Issues as you work toward a resolution. Use the Activity and Note tabs to add these if necessary.
4. Click the **Save** button when finished.

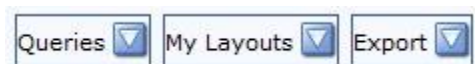


## Chapter 4 – Assets

Help Desk Authority provides an excellent means for keeping an inventory of your organization's Assets. In addition to storing information such as serial numbers, locations, and manufacturers, you can also capture key information about the vendors who have sold or who are leasing the Assets to you.

It is important to note that each Asset must be assigned an Asset Type. Therefore, you must create at least one Asset Type. For example, if you choose not to categorize your Assets by type, you can create one category called "Asset" and then assign this type to all Assets that you create.

### The Assets Main Menu



The Assets main menu consists of several menus that you will use to view and update Assets. Each drop-down menu will be covered in detail in this chapter.

### Queries

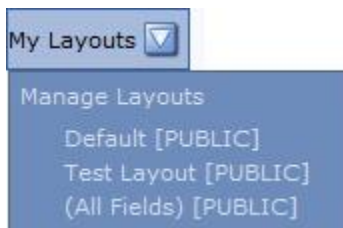


Queries are organized in the Queries drop-down menu. As you can see, Queries are grouped into folders similar to Issues. Simply select a Query to run it and view the results in the Assets window.

Queries are added to the Queries drop-down menu by using the Query Manager. To access the Query Manager, click the **Query Manager** link in the My Queries drop-down menu. For detailed information on using the Query Manager to build Queries, see (*The Query Manager* in Chapter 3 – Issues).



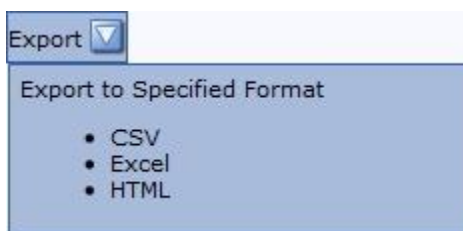
## My Layouts



The My Layouts menu contains the default and custom layouts that you use to view Asset lists. The menu will also contain a layout called **All Fields**, in which all of the fields of an Asset are shown in the list view.

These layouts are managed in the List Layout Manager (covered in the previous chapter under *List Layouts*).

## Export

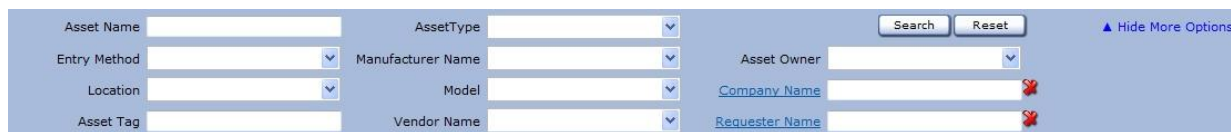


The Export drop-down menu allows you to export Asset lists or Query Results into CSV, Excel or HTML formats. While viewing the list you wish to export, select the export format from the menu.

If you chose CSV or Excel as your Export format, you will be presented with a pop-up notification asking you if you'd like to Open or Save the file. If you select **Save**, you will be prompted to chose the location.

If you select HTML as your Export format, you will see the results presented in a web browser.

## The Search Bar



If your organization has a large collection of Assets in your help desk database, it is often helpful to look at selected sub-sets of Assets rather than the whole list. This is where the search bar is useful.

Initially, only the **Asset Name** and **Asset Type** fields are displayed, along with a **Search** button and a **Reset** button. Clicking the **Show More Options** link will reveal nine more optional search fields.

You can also use the alphabet row shown below. Click a single letter, and all Assets beginning with that letter will be displayed.



## Creating a New Asset

1. Click the **Create New Asset** button. This will open the New Asset window.

The screenshot shows the 'New Asset' window with the 'Asset - Add' tab selected. The form contains the following fields and controls:

- Asset Name**: Text input field.
- Asset Type**: Drop-down menu.
- Asset Tag**: Text input field.
- Issue History**: Drop-down menu.
- Asset Owner**: Drop-down menu.
- Requester Name**: Text input field with a link icon and a red 'X' icon.
- Company Name**: Text input field with a link icon and a red 'X' icon.
- Location Name**: Drop-down menu.
- Department**: Drop-down menu.
- DA Asset**: Button with a document icon.
- Inactive**: Checkable box.
- Go**: Button.
- Manufacturer Name**: Drop-down menu.
- Model**: Drop-down menu.
- Serial Number**: Text input field.
- Part No**: Text input field.
- Vendor Name**: Drop-down menu.
- Date of Purchase**: Drop-down menu.
- Price**: Text input field.
- PO Number**: Text input field.
- Comments**: Text area.
- Save**: Button.
- Cancel**: Button.

2. Enter the name of the Asset in the **Asset Name** field.
3. Select the Asset type from the **Asset Type** drop-down menu.
4. Enter any Asset tag information in the **Asset Tag** field.
5. If this is a new Issue, you can ignore the **Issue History** field.
6. From the drop-down menu, select the **Asset Owner**. This will usually be Requester or Company.
7. Click the **Requester Name** field label. This is a link that will open the Requester window. Select a Requester from the list of possible Requesters.
8. Once a Requester name has been chosen, the **Company Name**, **Location Name** and **Department** fields will be automatically populated if they are populated within the Requester information.

### Tabs in the Asset - Add Window

The bottom pane of the Issue window consists of three tabs as shown below. Each tab will be explained in detail.



### *The General Tab*

1. Select the manufacturer name from the **Manufacturer Name** drop-down menu.
2. Select the model type from the **Model** drop-down menu.
3. Enter the serial number in the **Serial Number** field.
4. Enter the part number in the **Part No** field if applicable.
5. Select the vendor name from the **Vendor Name** drop-down menu.
6. In the **Date Purchased** field, select the date from the calendar drop-down.
7. Enter the price in the **Price** field.
8. Enter the purchase order number in the **PO Number** field.
9. The **Entry Method** field will be completed automatically and cannot be edited.
10. Enter any comments you would like to make in the **Comments** text box.

### *The Attachments Tab*

Use the Attachments tab to include any attachments necessary in the Asset.

1. To attach a file, click the **Browse...** button and browse to the correct file in the Open window, then click the **Open** button.
2. Click the **Attach File** button. The file will now be attached to the Asset..
3. To attach a URL, click the Attach URL button. This will open the **Attach URL** window. Enter the Web Address (URL) in the **Web Address** field, then enter a description in the **Description** field (both fields are required). Click the **Save** button when finished. Note that you must include "http://" with the URL.
4. To open an attachment, right-click on the attachment and select the application you would like to use to open the file, or select the attachment and click the **Open With** button, then select the application of your choice.
5. To delete an attachment, select the attachment and click the **Delete** button, then click **OK** at the prompt.
6. Click the **Save** button when finished, or select another tab to enter more information.

### *The Custom Fields Tab*

If there are any custom fields in the Issue, they will appear here in the Custom Fields tab. Complete any custom fields that are necessary.

### *Editing an Asset*

In your daily support activities you will most likely open and update existing Assets.

1. Open the Asset.
2. If anything has changed in the top portion of the Issue, make those changes.
3. You will often be adding Notes or Attachments to Assets. Use the General and Attachments tabs to add these if necessary.
4. Click the **Save** button when finished.

## Chapter 5 – Reports

Help Desk Authority supplies a comprehensive library of reports to assist you in your Issue management procedures. Help Desk Authority's standard reports were created with the report-writer Active Reports® by Data Dynamics.

For customers with unique needs who design their own reports with Crystal Reports is available, you can design the reports you need to your exact specifications, then launch them from the Help Desk Authority interface. Please note that the Help Desk Authority filtering features (Query, status and date filters) are not available for use with reports that are custom designed with Crystal Reports. For more information, see the Crystal Reports website at <http://www.crystalreports.com>.

The Standard Help Desk Authority Report Categories and Reports are listed in tree-form below.

- Issues
  - Billing Summary
  - Deleted Issues
  - Due Dates by Company
  - Due Dates by Group
  - Issue Detail by Company
  - Issue Detail With Activities
  - Issue Details
  - Issue Report by Assigned Person
  - Issue Summary
  - Issue Summary by Company
  - Issue Summary With Activities
  - Related Issues
  - Summary - Calls by User
  - Summary - Calls by Category
- Issues-Graphical
  - Graph - Average Time Spent By Categories
  - Graph - Average Time Spent By Users
  - Graph - Issues by Category and Status
  - Graph - Issues by Days of Week
  - Graph - Issues by Hours and Status
  - Graph - Issues by Month
  - Graph - Issues by Requester
  - Graph - Issues by User and Status
  - Graph - Issues by Week
  - Issues by Hour/Status and Priority
  - Percentage of Issues
- Issues-Statistical
  - Activity Stats By Technician/Requestor/Activity Type
  - Average Issues Per Week
  - Issue Count by Assigned Person and Status
  - Issue Report by Category
  - Issue Volume by Company(Top 10)
  - Issue Volume by Company/Requester
  - Ratio of Solved Issues by Category
  - Statistical Report by Assigned Users
  - Statistical Report by Category
  - Statistical Report by Priority
  - Statistical Report by Priority/SLA
  - Statistical Volume by Assigned User
- Assets
  - Assets by Company
  - Assets by Requester
  - Assets by type
- Company/Requester
  - Company/Requester Listing
- Contracts
  - Contract-Remainder
  - Contracts by Product
  - Support Contracts
- HDAsset Reports
  - Application Installation Checklist
  - Application Installation List
  - Application License Usage
  - Change Tracking
  - Computer Application List
  - Computer Hardware List
  - Computer Summary Report
  - Graph - Application Installations by Manufacturer
  - Graph - Computers by Assignment
  - Hardware Installation List
  - Hotfixes
  - Screen Savers
- Knowledge Base
  - KB Details
  - KB Self-Service Statistics
  - Modified KB Articles
  - New KB Articles
  - Related Articles
- Master Table Reports
  - Asset Manufacturers
  - Asset Types
  - Asset Vendors
  - Departments
  - Issue Activity Types
  - Issue Categories
  - Issue Types
  - Priorities
  - Sub-Status Codes
- Products
  - Products
  - Products by Company/Requester
- Custom Reports

## Standard Reports

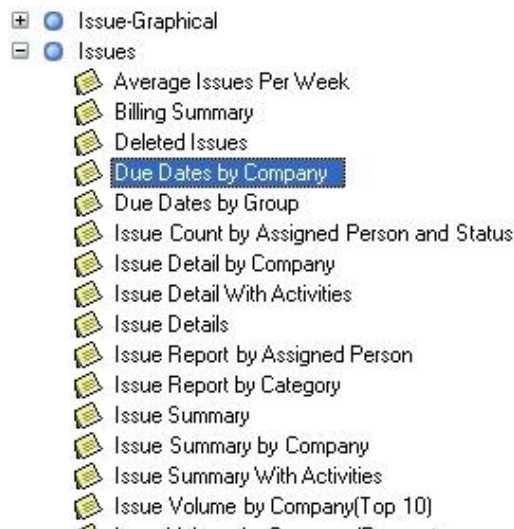
To run a standard Report:

1. Click the **Reports** icon in the toolbar. This will open the Reports window as shown below.

The screenshot shows the 'Reports' window with the following sections:

- Reports**: A tree view on the left containing:
  - ☒ **Issues**
    - Billing Summary
    - Deleted Issues
    - Due Dates by Company
    - Due Dates by Group
    - Issue Detail by Company
    - Issue Detail With Activities
    - Issue Details
    - Issue Report by Assigned Person
    - Issue Summary
    - Issue Summary by Company
    - Issue Summary With Activities
    - Related Issues
    - Summary - Calls by User
    - Summary - Calls by Category
  - ☐ Issues-Graphical
  - ☐ Issues-Statistical
  - ☐ Assets
  - ☐ Company/Requester
- Report Functions**: A button labeled 'Run Report'.
- Crystal Functions**: Three buttons labeled 'Add', 'Edit', and 'Delete'.
- Select Issues ...**:
  - ☐ **By Query**: Text box 'All Data', 'Find' button.
  - ☐ **By Status**: Dropdown menu 'All'.
  - ☒ **All Data**.
- Filter By Dates**:
  - Date Type**: Dropdown menu 'All'.
  - ☒ **Actual Date**: Text boxes 'Start Date' (1/1/2011) and 'End Date' (5/16/2011), each with a dropdown arrow.
  - ☐ **Relative Date**: Dropdown menu 'Today'.
- Include Active/Inactive Data**: Dropdown menu 'All Data'.

- The Report categories are in tree-structure. Expand a category by clicking the “+” before the Category, then select the Report you wish to run.



- If available, **Select Issues** by Query, Status or All Data. In the “Select Issues . . .” section (shown below), select the Issue data you would like to see in the Report.

A screenshot of a dialog box titled "Select Issues ...". It contains three radio buttons: "By Query", "By Status", and "All Data". The "All Data" radio button is selected. To the right of the "By Query" radio button is a text box containing "All Data" and a "Find" button. To the right of the "By Status" radio button is a drop-down menu showing "All".

Choose	To
By Query	Use the data resulting from a predefined Query in the Report. When you choose the <b>By Query</b> radio button, the <b>Find</b> button is enabled. Clicking the <b>Find</b> button will open the Query Manager window where you can select the Query you would like to use. At report run time, the Query will be executed and the Report will be generated using the data resulting from the Query.
By Status	Base the Report only on Issues with a particular Status. When you select the <b>By Status</b> radio button, the drop-down menu will be activated. Select the Status that you want to include in the Report.
All Data	Base the Report on all Issue data.



These options are only available in Reports from the Issues category, as well as the "Percentage of Issues" Report in the Issue-Graphical category.



4. In the Filter by Dates pane, if available, select the **Date Type**. You have three choices; Date Received, Date Resolved and Due Date. You can set a date range by checking the **Actual Date** radio button, or you can use a specific recent date with the **Relative Date** radio button.

**Filter By Dates**

**Date Type** All ▼

☒ **Actual Date**      **Start Date** 1/1/2011 ▼      **End Date** 5/16/2011 ▼

☐ **Relative Date**      Today ▼



It should be noted here that date ranges are now inclusive of their start and end dates. In previous versions of Help Desk Authority, these dates were excluded from the range.

Also, keep in mind that many Reports will be prompting you for additional information before running the selected Report. In some cases, this includes the option of setting an additional date range that is un-related to Date Type date range option. Neither of the two date ranges will override the other since they are referring to different elements of the Report.

5. If available, complete the **Include Active/Inactive Data** drop-down menu. The selections are explained below.

Choose	To
All Data	Include records with both an "Active" and an "Inactive" designation
Active Data Only	Include only those records with an "Active" designation
Inactive Data Only	Include only those records with an "Inactive" designation.

6. Click the **Run Report** button.



## Report Prompts

Depending upon the Report that you choose to run, Help Desk Authority may prompt you for additional information after clicking the **Run Report** button by opening certain windows for completion. These windows will be detailed in this chapter.

### Category Selection Window

Report used in:

- Graph - Average Issue Length by Category

Category Selection - Mozilla Firefox

http://sl-pa-22vwcf1/hdweb/Reports/SelectionWindowForGraphReports.aspx?WindowType

**Category Selection**

☒ **Select Categories**

**Available Categories**

- Administration
- Antivirus
- App Server
- Checkpoint
- Cisco
- Desktop
- Domain Controller
- Email
- Employee Leaving
- Employee Move

**Selected Categories**

> >> < <<

Specify the Minimum Percentage to appear on the Report: 0 %

☐ **Select Top X**

Specify Top X Value:

OK Cancel

In this window, you have two main selections; **Select Categories** or **Select Top X**.

If you check the **Select Categories** radio button, you will move categories that are most frequently involved with your Issues from the Available Categories list to the Selected Categories list using the arrow buttons. Select and move any categories you would like to see in the Report.

After making your selections, enter a value in the “**Specify the Minimum Percentage to appear on the Report**” field. This number indicates the percentage of records that you want to include in the Report.

If you choose the **Select Top X** radio button, enter the value of “X” in the **Specify Top X value** field. This number is based on the Issue categories that are used most often.

Click the **OK** button.

## User Selection Window

Report used in:

- Graph - Average Issue Length by User

User Selection - Mozilla Firefox

http://sl-pa-22vwcf1/hdweb/Reports/SelectionWindowForGraphReports.aspx?WindowType

User Selection

☒ **Select Users**

**Available Users**

Helpdesk Administrator  
John Smith  
Mary Jones  
iorgio oprejweiu

**Selected Users**

> >> < <<

Specify the Minimum Percentage to appear on the Report 0 %

☐ **Select Top X**

Specify Top X Value

OK Cancel

In this window, you have two main selections; **Select Users** or **Select Top X**.

If you check the **Select Users** radio button, you will move Users that are most frequently involved with your Issues from the Available Users list to the Selected Users list using the arrow buttons. Select and move any Users you would like to see in the Report.

After making your selections, enter a value in the “**Specify the Minimum Percentage to appear on the Report**” field. This number indicates the percentage of records that you want to include in the Report.

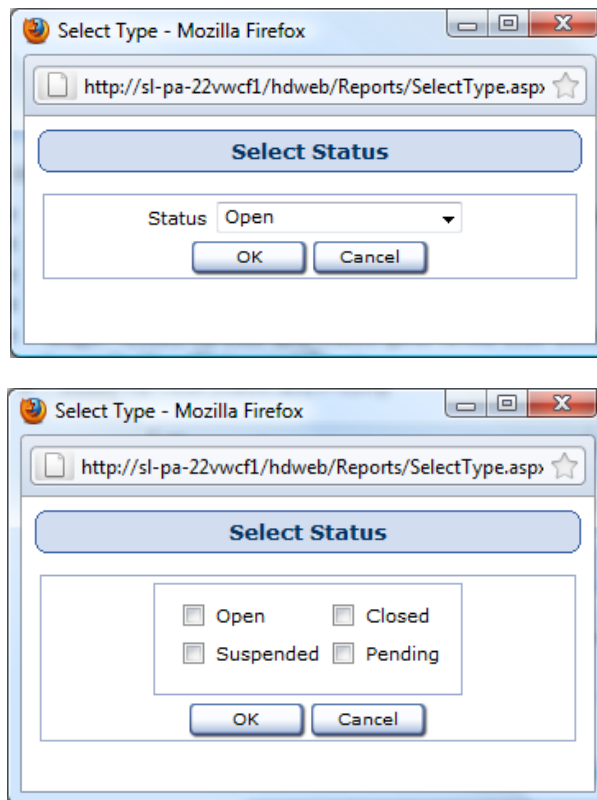
If you choose the **Select Top X** radio button, enter the value of “X” in the **Specify Top X value** field. This number is based on the Users that are used most often.

Click the **OK** button.

## Select Status Window

Reports used in:

- Graph - Issues by Category and Status (prior to the Category Selection window)
- Graph - Issues by Days of Week
- Graph - Issues by Hours and Status
- Graph - Issues by Month
- Graph - Issues by User and Status (prior to the User Selection window)
- Issues by Hour/Status and Priority



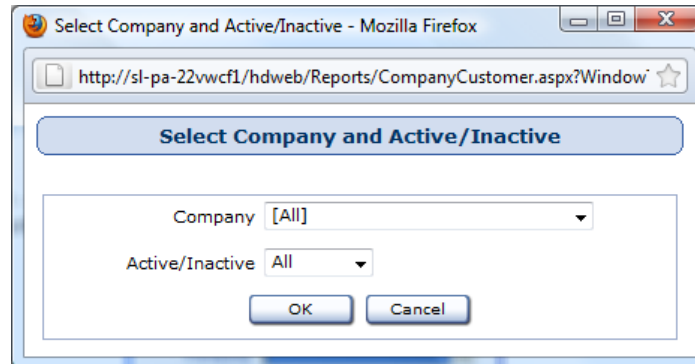
This window has only one field; **Status**. From the drop-down, select the Status you would like to use in the Report and click the **OK** button. You may be prompted for more information in another window after the Select Status window depending on the Report you are running.

Notice that there are two versions of the Select Status window. If you are running the Graph - Issues by Hours and Status Report, you will be presented with this second version of the Select Status window. This version allows you to select more than one Status by using the checkboxes, where the first version of the Select Status window only allows one selection via the drop-down menu.

### Select Company and Active/Inactive Window

Reports used in:

- Graph - Issues by Requester
- Support Contracts



There are only two drop-downs in this window.

First, select a company (or All companies) from the **Company** drop-down menu.

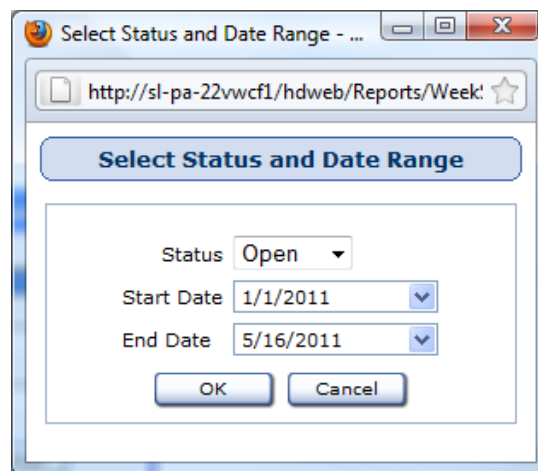
Next, select Active, Inactive or All from the **Active/Inactive** drop-down menu.

Click the **OK** button.

### Select Status and Date Range Window

Reports used in:

- Graph – Issues by Week



First, select the Status in the **Status** drop-down menu.

Next, select the start date of the date range in the **Start Date** drop-down calendar.

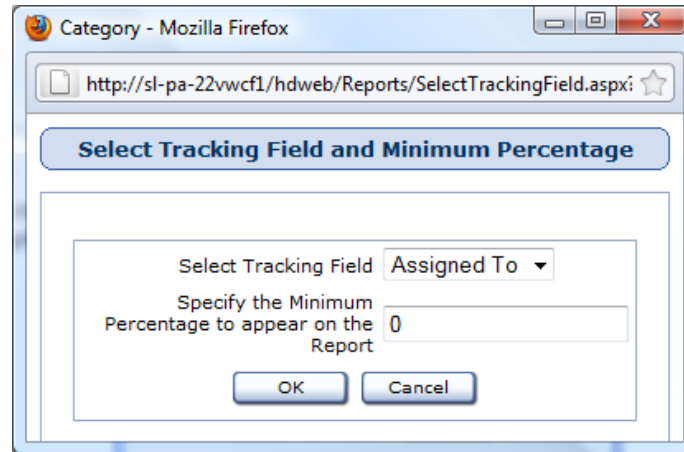
Then select the end date of the date range in the **End Date** drop-down calendar.

Click the **OK** button.

## Select Tracking Field and Minimum Percentage Window

Reports used in:

- Percentage of Issues
- Graph – Computers by Assignment

A screenshot of a web browser window titled 'Category - Mozilla Firefox'. The address bar shows the URL 'http://sl-pa-22vwcf1/hdweb/Reports/SelectTrackingField.aspx:'. Below the address bar is a blue header bar with the text 'Select Tracking Field and Minimum Percentage'. The main content area contains a form with two fields: 'Select Tracking Field' with a dropdown menu showing 'Assigned To', and 'Specify the Minimum Percentage to appear on the Report' with a text input field containing the number '0'. At the bottom of the form are two buttons: 'OK' and 'Cancel'.

First, select the field you would like to track from the **Select Tracking Field** drop-down menu.

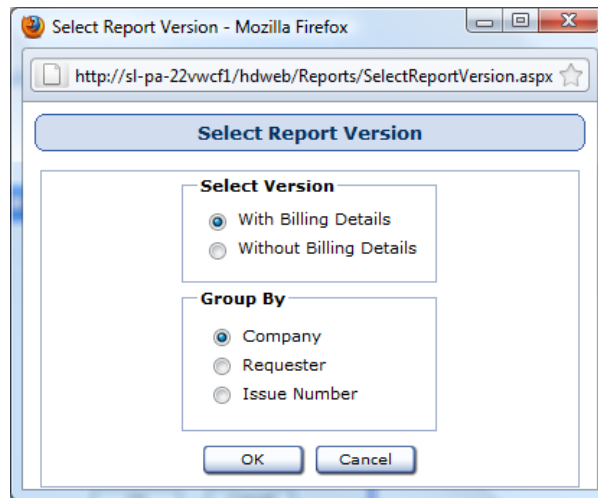
Next, select the minimum percentage of Issues with this tracking Issue that you would like to appear on the Report by entering a number in the “**Specify the Minimum Percentage to appear on the Report**” field.

Click the **OK** button.

## Select Report Version Window

Reports used in:

- Billing Summary



First, decide if you want to include billing details in your report and select either the **With Billing Details** radio button or the **Without Billing Details** radio button.

Next, select the item by which you wish to Group the Report by using the **Company**, **Requester** or **Issue Number** radio button.

Click the **OK** button.

## Select Deleted Issues To Be Reported Window

Reports used in: Deleted Issues

Select Deleted Issues To Be Reported - Mozilla Firefox

http://sl-pa-22vwcf1/hdweb/Reports/SelectReportActivityTypes.aspx?ReportDesc=RptDeletedIssues&ReportId=108

Select Deleted Issues To Be Reported

Available Users

- Helpdesk Administrator
- John Smith
- Mary Jones
- iorgio oprejweiu

Selected Users

Deleted Between

1/1/2011 5/16/2011

OK Cancel

First, select the available Users from the Available Users list and use the arrow buttons to move them to the Selected Users list.

Next, select the start date and end date in the **Deleted Between** date range section.

Click the **OK** button.

## Select Issue Type Window

Reports used in:

- Due Dates by Company
- Due Dates by Group

Select Issue Type - Mozilla Firefox

http://sl-pa-22vwcf1/hdweb/Reports/SelectIssueType

Select Issue Type

All Issues

OK Cancel

Select the Issue type from the **Issue Type** drop-down menu, All Issues or Overdue Issues.

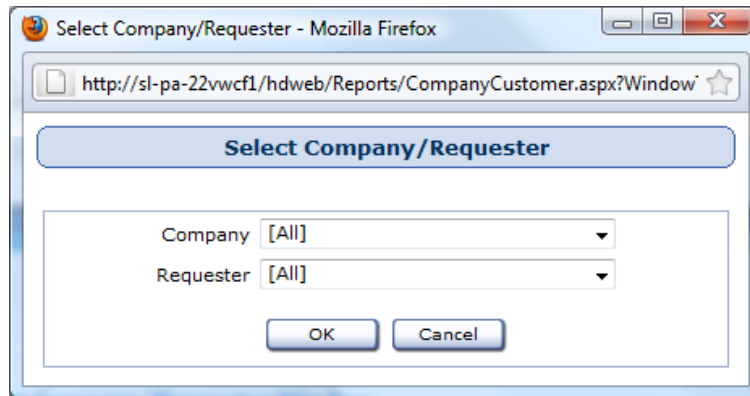
Click the **OK** button.



## Select Company/Requester Window

Reports used in:

- Issue Detail by Company
- Issue Summary by Company
- Assets by Requester
- Company/Requester Listing
- Products by Company/Requester



The screenshot shows a web browser window titled "Select Company/Requester - Mozilla Firefox". The address bar displays the URL "http://sl-pa-22vwcf1/hdweb/Reports/CompanyCustomer.aspx?Window". The main content area features a header "Select Company/Requester". Below the header, there are two dropdown menus: "Company" and "Requester", both currently set to "[All]". At the bottom of the form, there are two buttons: "OK" and "Cancel".

First, select the Company (or All) from the **Company** drop-down menu.

Next, select the Requester (or All) from the **Requester** drop-down menu.

Click the **OK** button.

## Select Activities and Technicians Window

Reports used in:

- Issue Detail With Activities
- Issue Summary With Activities

Select Graphical Reports - Mozilla Firefox

http://sl-pa-22vwcf1/hdweb/Reports/SelectActivitiesAndTechnicians.aspx?Inactive=2&ReportId=31&StartDate=1/1/2011&EndDate=5/17/2011

### Select Activities and Technicians

Available Activity Types	Selected Activity Types	Available Technicians	Selected Technicians
	Closed		Helpdesk Administrator
	Email from Requester		John Smith
	Email from User		Mary Jones
	Email Sent		iorgio oprejweiu
	Issue Reopened		
	New Issue		
	Note		
	On-site visit		
	Part Ordered		
	Requester Approved		

☒ Filter activities by activity date

1/1/2011 5/17/2011

OK Cancel

Unlike most selection lists in Help Desk Authority, the lists in this window default with the selections in the Selected lists instead of the Available lists. Most Users will want a lot of detail in these two reports, so the default is the maximum. Any selections that you don't want in these reports, you will move them to the Available lists.

First, move any unwanted Activity Types from the Selected list to the Available list using the arrow buttons.

Next, move any unwanted Technicians from the Selected list to the Available list using the arrow buttons.

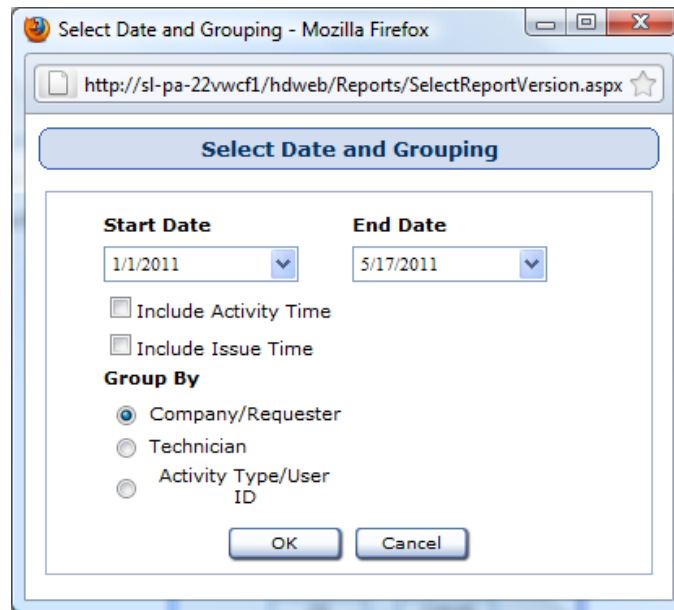
If you would like to set a date range for your data, mark the **Filter Activities by Activity date** checkbox. Then select a start date and end date for the date range with the drop-down calendars provided.

Click the **OK** button.

## Select Date and Grouping Window

Reports used in:

- Technician by Time Spent



First, select a start date for the date range using the **Start Date** drop-down calendar.

Next, select an end date for the date range using the **End Date** drop-down calendar.

If you would like to include Activity time in the report, check the **Include Activity Time** checkbox.

If you would like to include Issue time, check the **Include Issue Time** checkbox.

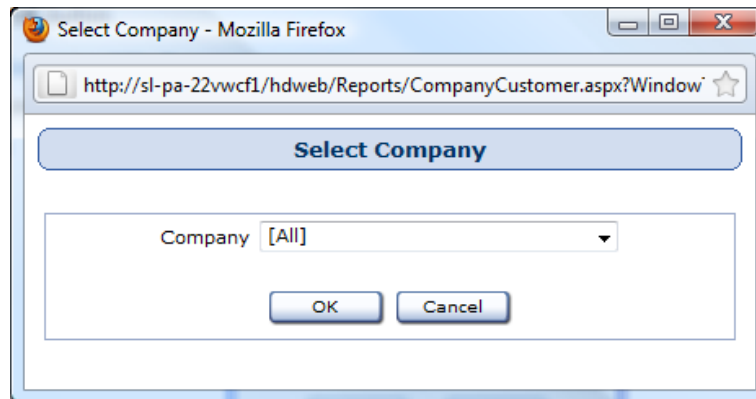
In the Group By section, select Grouping by **Company/Requester**, **Technician** or **Activity Type/User ID** by selecting the appropriate radio button.

Click the **OK** button.

### Select Company Window

Reports used in:

- Assets by Company



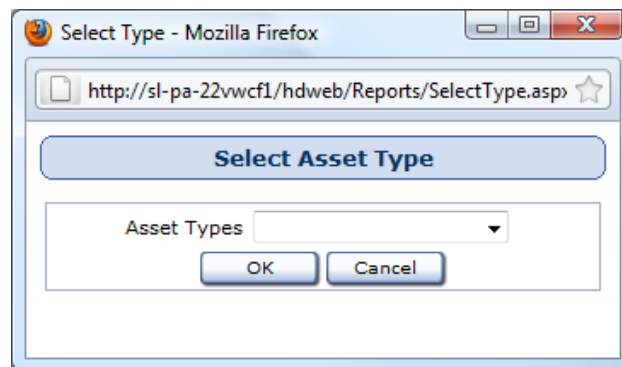
Select the Company name from the **Company** drop-down menu.

Click the **OK** button.

### Select Asset Type Window

Reports used in:

- Assets by Type



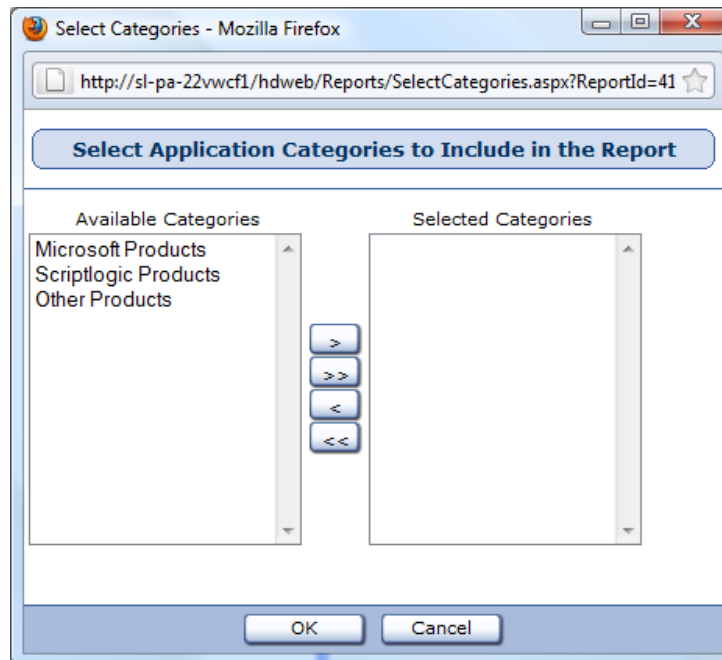
Select the Asset Type from the **Asset Types** drop-down menu.

Click the **OK** button.

## Select Categories Window

Reports used in:

- Application Installation Checklist



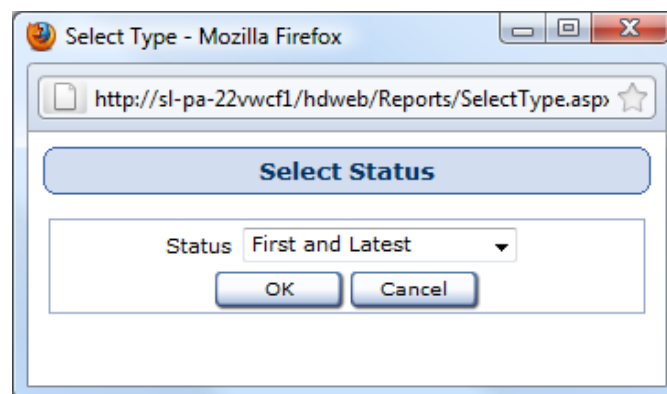
Select the application categories you would like to use in the Report by moving them from the Available Categories list to the Selected Categories list using the arrow buttons.

Click the **OK** button.

## Select Audits Window

Reports used in:

- Change Tracking



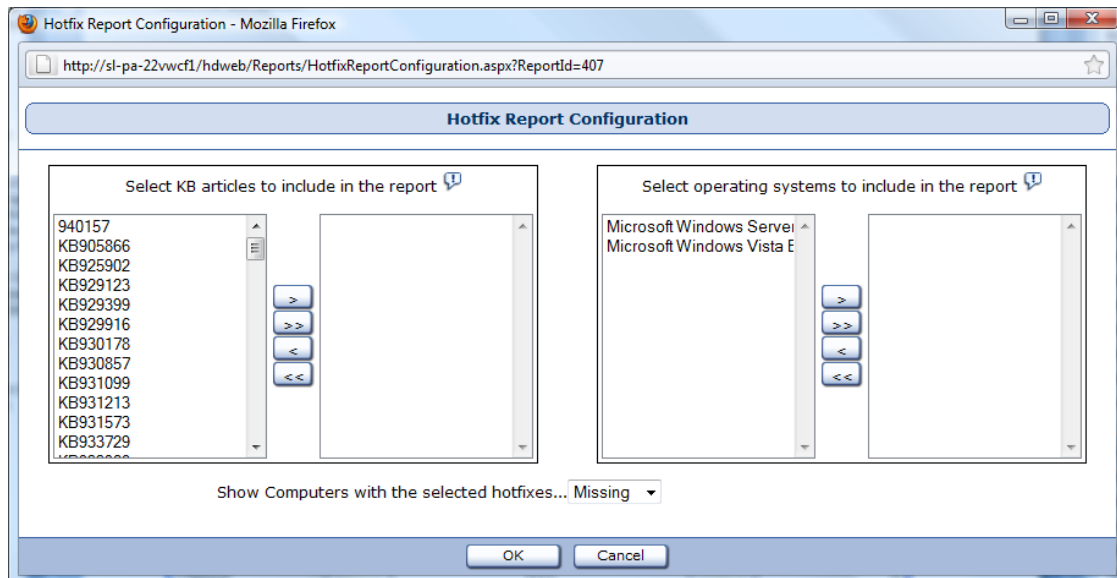
From the **Audits:** drop-down menu, select either “First and Latest” or “Most Recent Two”.

Click the **OK** button.

## Hotfix Report Configuration Window

Reports used in:

- Hotfixes



First, under the **Select KB articles to include in the report** section, select the Knowledge Base articles to use in the report by moving the available articles from the left pane to the right pane using the arrow buttons.

Next, under the **Select operating systems to include in the report** section, select the operating systems to use in the Report by moving them from the left pane to the right pane using the arrow buttons.

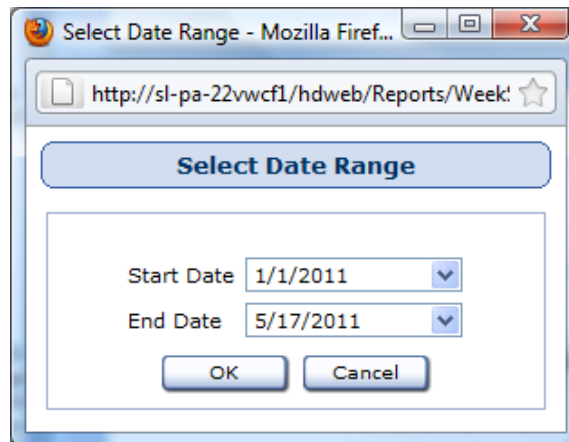
In the **Show computers with the selected hotfixes** drop-down menu, choose either Missing, Installed or (Both).

Click the **OK** button.

## Select Date Range Window

Reports used in:

- Modified KB Articles
- New KB Articles



Select the start date for the date range from the **Start Date** drop-down calendar. Then select the end date from the **End Date** drop down calendar.

Click the **OK** button.

## Custom Reports

To accommodate the custom reporting needs of our users, Help Desk Authority allows access to customer Reports through the report writing software, Crystal Reports. Your organization can design Custom Reports that pull data from the Help Desk Authority database tables. The Custom Reports can be designed to your exact specifications and run from within the Help Desk Authority for Web interface. However, the Help Desk Authority filtering features (Query, status and date filters) are not available for use with Reports that are custom designed with Crystal Reports.



The Custom Reports in Help Desk Authority for Web will only work with Crystal Reports version 10.5 or higher. If you are using an older version of Crystal Reports, the Custom Reports you have created will not work with Help Desk Authority.

The Custom Reports will be accessed by selecting **Custom Reports** at the bottom of the report tree as shown below.

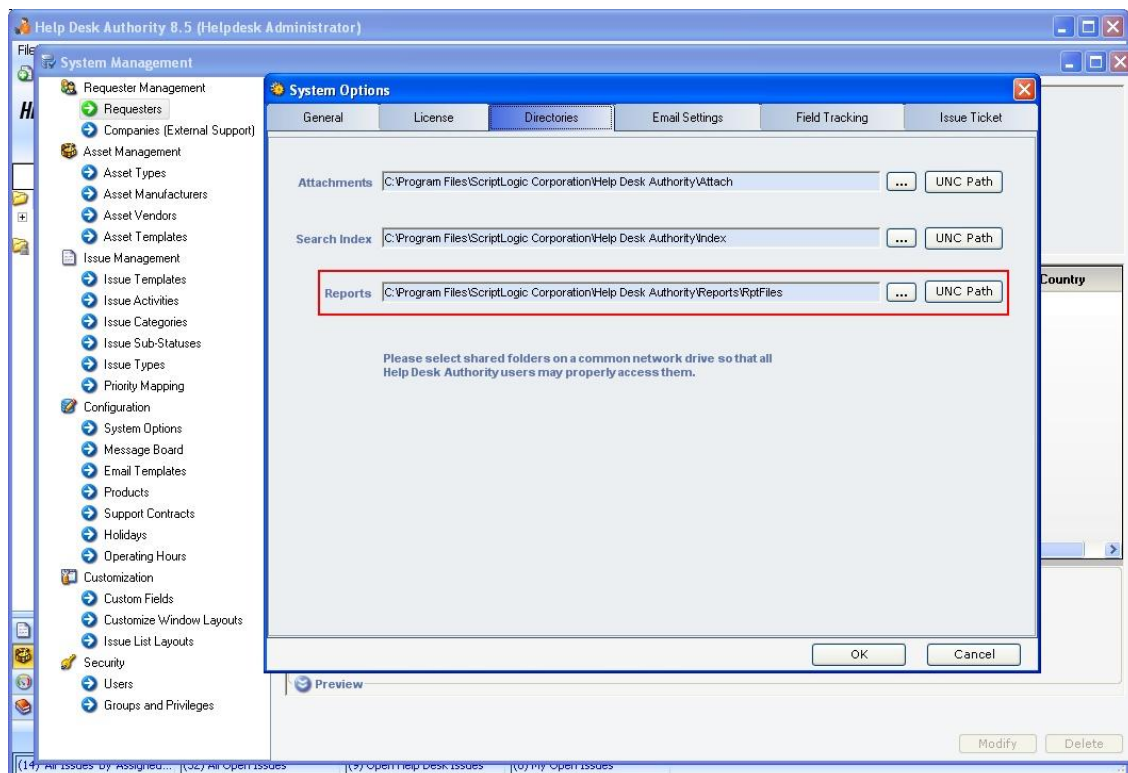


The **Add** button is used to add additional reports to the Custom Reports category. You do not need to select the Custom Reports category in order to use the **Add** button since all custom reports will be automatically inserted into the Custom Reports category.

## Configuring the Reports Directory

Although this topic has been covered earlier in this manual, it is important enough to repeat.

You must specify a Reports directory in the System Options of Help Desk Authority. All reports, including the custom Reports, will reside in the directory you specify. This is done by going to the Administration window, then **System Options** under the Configuration heading as shown below.







Note that you can create a folder anywhere you like to contain the reports of Help Desk Authority. However, most help desks will share Reports (including Custom Reports) over a server. The most common (and preferred) method is to provide a UNC path. Each computer running the application will interpret the path literally.

## Adding a Custom Report

To add a Custom Report to the list of Reports:

1. Click the **Add** button in the Crystal Functions section of the Reports window. This will open the Add Report window shown below.

2. Click the **Browse** button and locate the custom report you would like to add.
3. Enter a description for the Custom Report in the **Description** field. This description will appear in the Custom Reports list.
4. Click the **Save** button. The Custom Report will now appear in the list under Custom Reports.

To edit (rename) a Custom Report:

1. Select the Custom Report you would like to edit.
2. Click the **Edit** button. This will open the Edit Report window.
3. Edit the description in the **Description** field.
4. Click the **Save** button.

To delete a Custom Report:

1. Select the Custom Report you wish to delete.
2. Click the **Delete** button.
3. Click the **Yes** button when prompted. The Custom Report will no longer appear in the Custom Reports list. Note that this does not actually delete the report. It will still remain in the folder you configured to hold reports.

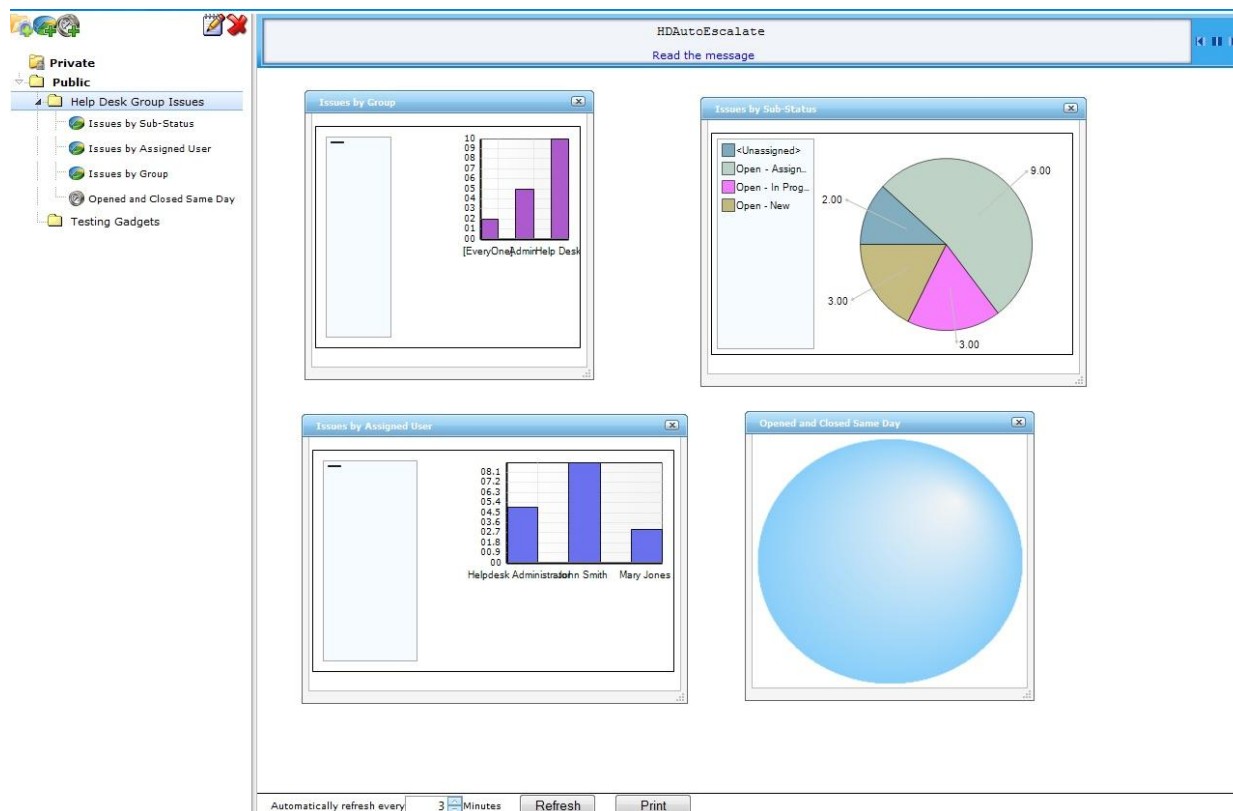
To run a Custom Report:

1. Select the custom Report you would like to run.
2. Click the **Run Report** button. The custom report will run just like any Standard Report.

## Chapter 6 – The Dashboard

The Help Desk Authority Dashboard provides an integrated visual representation of Issue data. The Dashboard is comprised of graphical widgets. Widgets are customizable and can be laid out based on each User's needs.

The top pane of the Dashboard, above the widgets, is the Message board (covered later in this chapter).



The data in your widgets will automatically refresh in real-time depending upon the interval you set manually. At the bottom of the Dashboard is the Refresh information as shown below.

Automatically refresh every  Minutes

In this example, the Dashboard date in your widgets is scheduled to refresh every 3 minutes. To change the number of minutes, use the numeric up-down field or simply type in any number between 1 and 999.

You can force a refresh of the Dashboard at any time by clicking the **Refresh Now** button.

If you would like to print the widgets on the screen, click the **Print** button.

To view the Issue data from any widget, click the widget anywhere in the window.

## Widgets and Widget Categories

The widgets are Graph and Query widgets, meaning they present data in only one dimension, or they present data from a specific Query. These widgets are created on the Widget Collections window. Widgets can be categorized as Public or Private. Public widgets can be used by all Users, and Private widgets can only be used by the User who creates it.




### Creating Widget Categories

In the navigation pane of the Dashboard is a categorical list of widgets. The two main folders are Private and Public. Under each folder, widget categories can be created. Widgets can then be created and stored in each category.



In the sample below, the category “Help Desk Group Issues” is listed under the Public folder, and there are four widgets in this category. Each widget is represented by an icon that varies depending on the type of widget selected. The in the sample below, there are three graph widgets and one gauge widget.



To create a widget category:

1. Select the main category, Public or Private.
2. Click the  icon to open the Widget Category window.
3. Enter the name of the new widget category in the **Category Name** field.
4. Click the OK button.
5. To edit the name of the category, select the category and click the  icon. This will open the Graph Configuration (or Gauge Configuration) window where you can edit the various variables of the widget, including the name.
6. Make your edits, and click the **OK** button when finished.
7. To delete a widget category, select the category and click the  icon. When prompted, click the **Yes** button and the category will be deleted.

## Creating a Widget

1. Select the category for the new widget.
2. Click the  icon if you would like to create a new graph widget, or click the  icon to create a new gauge widget. This will open either the Define Graph Widget window or the Define Gauge Widget window, both described below.

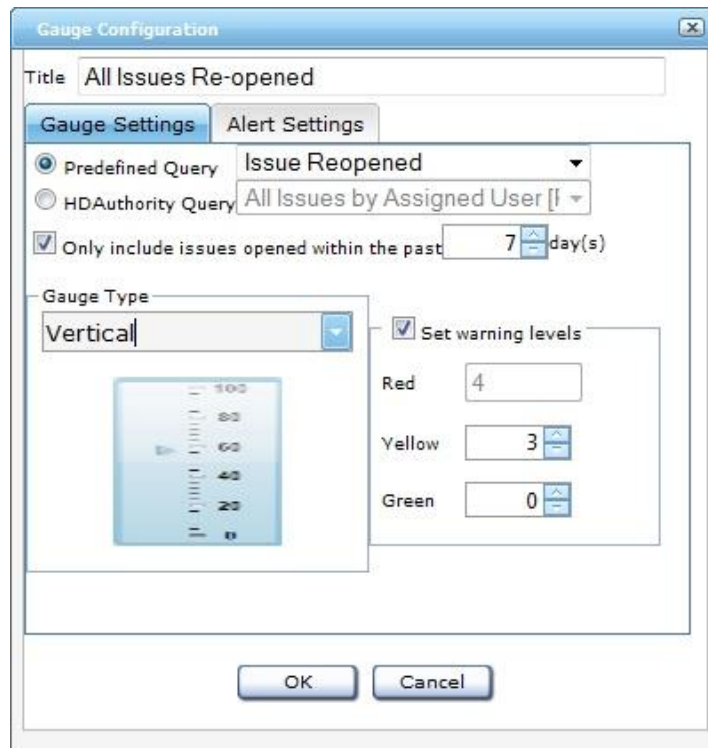
### The Graph Configuration Window



1. Enter the title you would like to use for the new widget in the **Title** field.
2. In the **Graph Type** section, use the drop-down menu to select one of the 31 possible graph types available for your widget.
3. Select the values you would like to use in the **X Axis**, **Y Axis** and **Z Axis** drop-down menus.
4. In 3-dimensional (3D) graphs, you have the option of Axis rotation for each axis in the graph. This allows you to manipulate the graph at any time to change the view of the data. To enable this feature, check the **Allow Axis rotation (3D Graphs)** checkbox.
5. If you would like to set a date range for the results presented in your graph, check the **Only include Issues received between** checkbox, then select the start date and end date for the range by using the drop-down calendars.
6. If you would like to refine the results of the graph by Query, check the **Only include Issues found with the Query** checkbox, then select the Query from the drop-down menu.
7. Click the **OK** button when finished.

## The Gauge Configuration Window

There are two tabs in the Gauge Configuration window. The first, Gauge Settings, is shown below.



1. Enter the title you would like to use for the new widget in the **Title** field.
2. Using the radio buttons, select between **Predefined Query** and **HDAuthority Query**, then select the preferred Query for your results from the drop-down menu.
3. To narrow your results by recent date, check the **Only include Issues opened within the past** checkbox, then select the number of days in the **days** numeric up-down field.
4. In the **Gauge Type** section, use the drop-down menu to select one of the 7 possible gauge types available for your widget.
5. In the Set warning levels section, check the **Set warning levels** checkbox if you would like to set colored warning levels at certain intervals on your gauge. If you choose this option, continue with setting the three warning levels, **Green**, **Yellow** and **Red** with numeric intervals of your choosing. Use the numeric up-down fields after each level. Note that Green is always the lowest level. Yellow will not be able to be set to a value less than the value defined in the **Green** field.

6. Click the Alert Settings tab (shown below):



The screenshot shows the 'Gauge Configuration' dialog box with the 'Alert Settings' tab selected. The 'Title' field contains 'Opened and Closed Same Day'. The 'Alert Settings' section includes several checkboxes: 'Issue an alert when the gauge rises above' (checked), 'Show a desktop notification' (checked), 'Include a sound alert' (checked), and 'Send an email notification to...' (unchecked). The 'Issue an alert...' checkbox is followed by a numeric up-down field set to '20' and the text 'issue(s)'. Below the email checkbox, there are two radio buttons: 'The logged-in user' (selected) and 'The following addresses' (unselected). A text field for email addresses is next to the second radio button, with the instruction 'Separate addresses with semicolons' below it. At the bottom are 'OK' and 'Cancel' buttons.

7. If you would like specific alerts to trigger on different values in the widget, check the checkbox labeled **Issue an alert when the gauge rises above**, then enter a value in the **Issue(s)** numeric up-down field that will trigger the alerts.




Note that you must check this first checkbox to create an alert. If this box is unchecked, all other options will be unavailable.

Also, if you do elect to be presented with alert notifications, you must select either **Show a desktop notification** or **Send an email notification to...**, or both.

8. If you would like a desktop notification, check the **Show a desktop notification** checkbox. If you would like a sound alert to go with the desktop notification, check the **Include a sound alert** checkbox.
9. If you would like an email notification, check the **Send an email notification to...** checkbox. Then select either **The logged-in user** or **The following addresses** radio button. If you select **The following addresses** radio button, enter the email address(es) in the field provided, separating multiple email addresses with a semicolon.
10. Click the **OK** button.

## Editing a Widget

To edit a widget, do one of the following:

Select the widget you would like to edit from the tree-view and click the  icon. This will open the widget definition window. Make your edits and click the **OK** button.

OR


Double-click the widget in the tree-view. This will open the widget definition window. Make your edits and click the **OK** button.

OR

Right-click the widget in the tree-view and select **Edit This Widget**. This will open the widget definition window. Make your edits and click the **OK** button.

## Deleting a Widget


To delete a widget, do one of the following:

Select the widget you would like to delete from the tree-view and click the  icon. This will delete the widget.

OR

Right-click the widget in the tree-view and select **Delete This Widget**. This will delete the widget.

OR

From the widget, click the  icon. This will delete the widget from the Dashboard but not from the tree-view. The widget is still available to add to the Dashboard when needed.

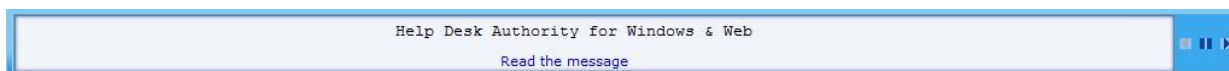
## Re-Sizing and Arranging Widgets

The Dashboard comes with the ability to customize the views and layout of your selected widgets. You can re-size widgets, re-arrange them, and place them anywhere you like.

You can move a widget to any location you like by clicking the title bar and dragging it to a new location. If you would like to re-size a widget, grab it by the handle in the lower-right corner of the widget and size the widget to the desired height and width.

## The Message Board

The top pane of the Dashboard contains the Help Desk Authority Message Board. You can edit the Message Board to display any important messages that all Help Desk Authority Users and HDAccess customers should see. A good example would be a bulletin to notify Users of a scheduled system downtime. Multiple Headlines can be displayed, and the display sequence can also be controlled. A sample message is shown below.



The buttons to the left of the Message board can be used to stop or start the automatic scrolling of the Message Board messages (center button), or to view the previous message (left button) or the next message (right button) in the sequence.

For details on the configuration and management of the Message board, see *The Message Board* under *Configuration* in *Chapter 2 – Administration*.



## Chapter 7 – The Knowledge Base

Help Desk Authority's Knowledge Base feature facilitates trouble-shooting and problem solving capabilities by storing Issues that you choose in an organized reference library. The information is automatically extracted from the Issue and written to the Knowledge Base. You can also create your own items to store in the Knowledge Base.

The Help Desk Authority Knowledge Base is comprised of Knowledge Base Articles. Knowledge Base Articles can be accessed via other Help Desk Authority products, such as HDAccess, unless they are designated for internal use only. If an Article is designated for internal use only, it will only be accessible by Help Desk Authority Users.

**HELP DESK AUTHORITY** Issues Assets Reports Dashboard KBase Query Admin Search Quick Tasks Help Logout

Search Knowledge Base for word(s) or phrase:

Search For: All of the words entered

Category:  Sub-Category:  Product:

Search Reset

Knowledge Base Configuration Categories Create New Article

Options	Article ID	Title	Date Created
	<a href="#">KB101</a>	brdgutil	0
	<a href="#">www.kemma.com</a>	20070126144004	9/14/2009 10:20:31 AM
	<a href="#">SQL101</a>	How to set up BridgeTrak Suite for use with SQL Se	0
	<a href="#">KB102</a>	How to add a date to a custom report	0
	<a href="#">KB103</a>	An error occurred while parsing Entity name	4/14/2006 9:23:05 AM
	<a href="#">AXD102</a>	Data Mapping from Active Directory to BridgeTrak ;	0
	<a href="#">KB105</a>	How to invoke the Report Designer in BridgeTrak fo	0
	<a href="#">AXD103</a>	Known issues with the current version of Active Dir	0
	<a href="#">SRH101</a>	BridgeSearch automatically detects fields in the foll	0
	<a href="#">AXD101</a>	Duplicated records apperaring in the CUSTOMERS t	0

1 - 10 (of 72 total) << First < Previous | Next > Last >> 10 Per Page Automatically refresh every 5 Minutes Refresh



## Searching the Knowledge Base

The section above the Knowledge Base Article List is the search engine.

<p>Search Knowledge Base for word(s) or phrase:</p> <input type="text"/>	<p>Category <input type="text"/></p> <p>Sub-Category <input type="text"/></p> <p>Product <input type="text"/></p>	<p><input type="button" value="Search"/></p> <p><input type="button" value="Reset"/></p>
--	---	--

There are several options you can use when searching the Knowledge Base. You can search on a word or phrase by entering that word or phrase into the textbox provided. In the **Search for:** drop-down menu, select either “All of the words entered”, “Any of the words entered”, or “Exact Phrase”.

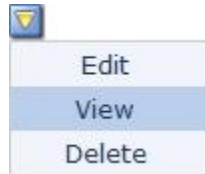
You also have the option to search on an Article **Category**, **Sub-Category** or **Product** by using the dropdown menus for each.

To search the Knowledge Base:

1. Enter the search criteria of your choice in the fields and drop-down menus provided.
1. Click the **Search** button.
2. To clear all search fields, click the **Reset** button.
3. To see the entire population of Knowledge Base Articles, do not enter anything in the search fields. Simply click the **Search** button.

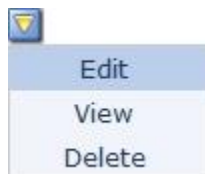
## Reading a Knowledge Base Article

When you locate the Article or list of Articles you are searching for, double-click anywhere in the listing row of the Article to open the Article. You can also single-click the Article ID. If you use the Options selection box, select **View**. The Article will open as shown below.

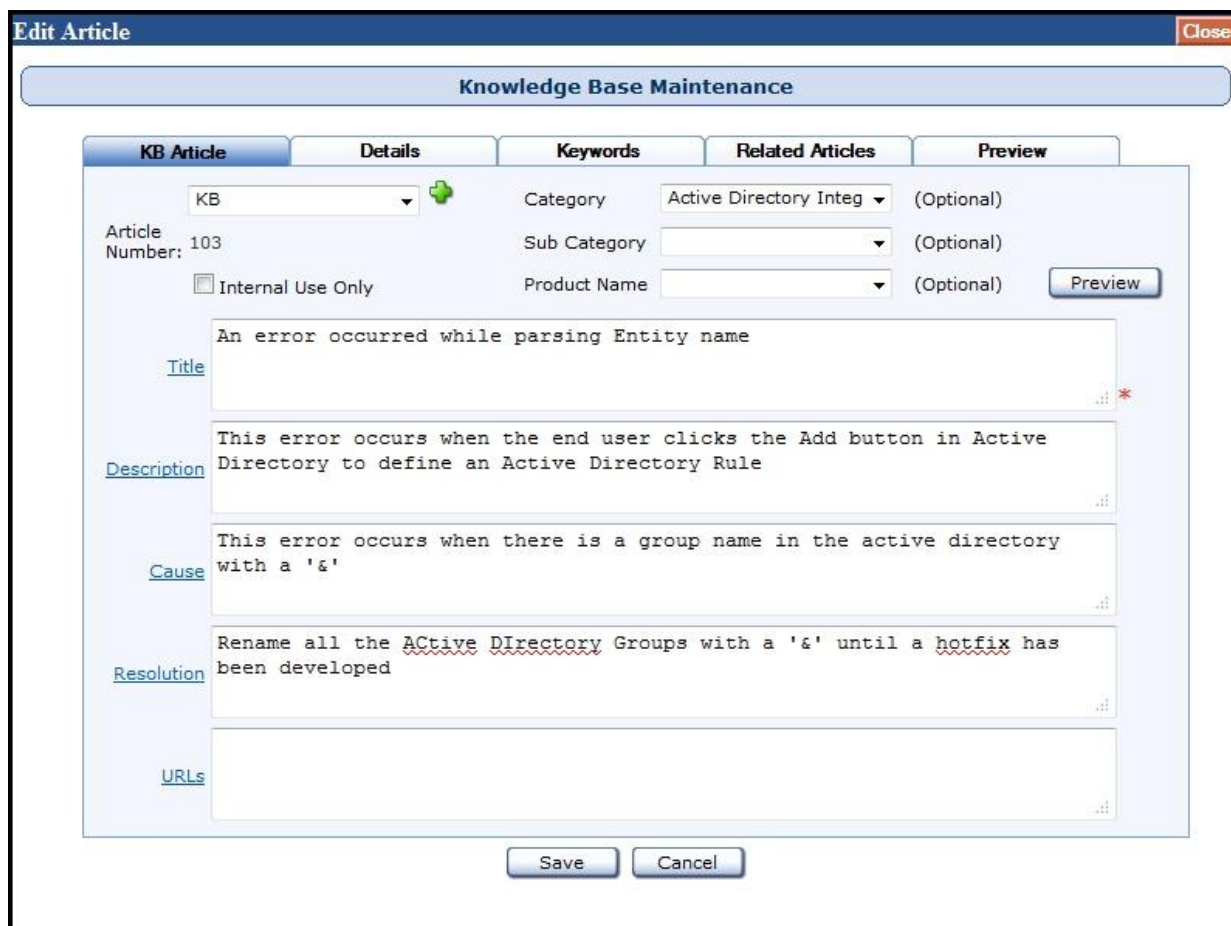


## Creating and Editing a Knowledge Base Article

For a more detailed look at a Knowledge Base Article, select **Edit** from the Options selection box. This will open the Article in Edit view as shown below.



To create a new Article, click the **Create New Article** button. This will open the New Article window. It is identical to the Edit Article window.




There are five tabs in the edit window of a Knowledge Base article. Each will be explained in detail below.

## *The KB Article Tab*

There are five tabs in a Knowledge Base Article. This first tab, shown above, is the KB Article tab.

The **Article Prefix** drop-down (not labeled) is populated with pre-defined prefix choices that are compiled in KB Configuration (described later in this chapter). This prefix is paired with the **Article Number** below it. The **Article Number** field is automatically populated when the Article is created.

To add a prefix, click the . This will open the Add Article Prefix window shown below. Enter the prefix you would like to add and click the **Save** button.

The **Category** and **Sub Category** drop-downs are also User-defined (see later in this chapter). They are optional fields, but they will usually be completed.

Another optional field is the **Product Name**. If the correct selection is available in the drop-down, it is recommended that you use it.

If the **Internal Use Only** checkbox has been checked, the Article is limited to internal technicians only.

If you click the **Preview** button, the Preview tab will open to give you a visual of the Article in HTML. This is how it will look online when your customers view them through HDAccess.

The next five fields will be automatically populated if the Article has been created from an Issue, and if the Issue contains the information. You can also enter text or HTML into these fields. If you are using HDAccess, and you would like to grant your customers the ability to view Knowledge Base Articles online, HTML provides a more user-friendly view.

Also, clicking on the field name will open a much larger text area in a new window. Some Users find this environment easier to work with when reading Knowledge Base Articles.

The **Title** field will show the title of the Article.

The **Description** field will contain a detailed description of the Issue or problem.

The **Cause** field will show a list of factors that caused the problem.

The **Resolution** field will list the steps taken to resolve the problem.

The **URLs** field will contain any URLs with relevant information to the Issue.

## The Details Tab

The Details tab contains more detailed information regarding the Article.

The screenshot shows a web application window titled "Edit Article" with a "Close" button in the top right corner. The main content area is titled "Knowledge Base Maintenance" and contains several tabs: "KB Article", "Details" (which is selected), "Keywords", "Related Articles", and "Preview".

Under the "Details" tab, there are two main sections. The left section contains the following fields:

- Created User :
- Created Date : 4/14/2006 9:23:05 AM
- Changed User :
- Changed Date : 4/14/2006 9:27:39 AM
- Status : In Development

The right section is titled "HDAccess Statistics" and contains the following fields:

- Last Used Date : 4/29/2008 4:19:08 PM
- Read Count : 3
- Found Useful Count : 0
- Not Useful Count : 0

Below these fields is a large, empty rectangular box. At the bottom of the window, there is a section titled "Attachments" and two buttons: "Save" and "Cancel".

The top eight fields on this tab are automatically populated.

- **Created User** is the User who created the Article.
- **Created Date** is the date the Article was created.
- **Changed User** is the User who last updated the Article.
- **Changed Date** is the date and time of the last change to the Article.
- **Last Used Date** is the date that the Article was last viewed.
- **Read Count** is the number of times the Article has been viewed.
- **Found Useful Count** is the number of times a reader noted the Article as useful.
- **Not Useful Count** is the number of times a reader noted the Article as not useful.

Below these eight fields is the **Status** field. This contains any information regarding the status of the Issue described in the Article.

The bottom section of the tab is used for attachments. To view these attachments, select the attachment and click the **Open With** button, then select the appropriate application.

## The Keywords Tab

The keywords connected to the Article are used for searching. When a user types a word or phrase into the search box, Help Desk Authority scans the keywords of articles to find matches.

The screenshot shows a web application window titled "Edit Article" with a "Close" button in the top right corner. Below the title bar is a "Knowledge Base Maintenance" header. The main content area has five tabs: "KB Article", "Details", "Keywords" (which is selected and highlighted in blue), "Related Articles", and "Preview". Under the "Keywords" tab, there is a list box labeled "Keyword" containing one empty entry. To the right of the list box are three buttons: "Add", "Edit", and "Delete". At the bottom of the window are "Save" and "Cancel" buttons.

To add keywords to the Article, click the **Add** button. This will open the Add Keyword window. Enter any keyword you would like to add and click the **OK** button. To edit any keyword, click the **Edit** button, make the edits, and click the OK button. To delete the keyword, select the keyword and click the **Delete** button.

### *The Related Articles Tab*

Often, a Knowledge Base Article will have Articles that are similar or are related to the same Issue. By relating these Articles, searching the Knowledge Base for an answer to a problem will be easier.

When you see related Articles, you can select them (from the Preview tab) to read more on the related Issue.

The screenshot shows a web application window titled "Edit Article" with a "Close" button in the top right corner. Below the title bar is a "Knowledge Base Maintenance" header. The main content area has five tabs: "KB Article", "Details", "Keywords", "Related Articles" (which is selected), and "Preview". The "Related Articles" tab displays a table with two columns: "Article ID" and "Title". The table contains one row with the values "www.kemma.com" and "20070126144004". To the right of the table are "Add" and "Remove" buttons. Below the table, there is a pagination control showing "1 - 1 (of 1 total)" and navigation links: "<< First", "< Previous", "Next >", and "Last >>". At the bottom of the window are "Save" and "Cancel" buttons.

Article ID	Title
www.kemma.com	20070126144004

To add related Article, click the **Add** button. This will open the Select Related Article window. Select an Article from the list by clicking on the Article ID. The Article will be added to the current Article as a related Article.

To remove an Article from the related Articles list, select the article and click the **Remove** button. The Article will no longer be directly related to the current open article.

### The Preview Tab

The Preview tab displays the Knowledge Base Article in HTML format, just as it would appear in HDAccess. From the Preview tab, you can email the Article by clicking the **Email** button.

Near the bottom of the Preview tab is the Related Articles section. If there are Related Articles listed, you can select one to view by clicking on the name of the Article.

**Edit Article** Close

**Knowledge Base Maintenance**

**KB Article** **Details** **Keywords** **Related Articles** **Preview**

## Data Mapping from Active Directory to BridgeTrak 7.x database

**Description**

The following fields are currently being imported from Active Directory to BridgeTrak:

**Cause**

**Resolution**

**Email**

**Related Articles**

20070126144004  
Data Mapping from Active Directory to BridgeTrak 7.x database

**Save** **Cancel**